

# Intercity Transit Authority



## TRANSIT 101 HANDBOOK

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## **THE MISSION**

*Our mission is to provide and promote transportation choices that support an accessible, sustainable, livable, healthy, prosperous community.*

## **THE VISION**

*Our vision is to be a leading transit system in the country, recognized for our well trained, highly motivated, customer-focused, community-minded employees committed to enhancing the quality of life for all citizens in Thurston County.*





**To:** Intercity Transit Authority  
**From:** Pat Messmer  
**Subject:** Meeting Attendance Schedule

Authority members take turns attending the Citizen Advisory Committee meetings to hear their comments, and then share the Authority's views on various issues. The following is the schedule through December 2016.

**Citizen Advisory Committee Meetings  
Authority Attendance Schedule**

<b>Date of Meeting</b>	<b>Authority Member Attending</b>
January 11, 2016	Bud Blake
February 8, 2016	Debbie Sullivan
March 21, 2016	Ryan Warner
April 18, 2016	Clark Gilman
May 16, 2016	Ed Bricker
June 20, 2016	Don Melnick
July 18, 2016	Jeff Gadman
August 15, 2016	Molly Carmody
September 19, 2016	No Meeting - Joint Meeting
October 17, 2016	Karen Messmer
November 21, 2016	Bud Blake
December 19, 2016	Debbie Sullivan

**Please mark these dates on your calendar!** If the date does not work for you, contact me right away. I will make every effort to arrange a switch for you. I will provide you with a reminder and a packet the week prior to the meeting.

Your support for Authority member attendance at these meetings is appreciated by the Citizen Advisory Committee and staff. Meetings are the **3<sup>rd</sup> Monday** of each month, **5:30 p.m.**, except January and February due to holidays. These are scheduled for the **2<sup>nd</sup> Monday** of the month. All meetings are in the Boardroom.

**AGENDA**  
**INTERCITY TRANSIT AUTHORITY**  
**February 3, 2016**  
**5:30 P.M.**

**CALL TO ORDER**

- 1) **APPROVAL OF AGENDA** **1 min.**
  
- 2) **INTRODUCTIONS** **10 min.**
  - A. **Michael Fuller, Vehicle Service Worker** *(Paul Koleber)*
  - B. **Les Kingsley, Vehicle Service Worker** *(Paul Koleber)*
  - C. **Mark Brown, Vehicle Cleaner** *(Paul Koleber)*
  - D. **Lisa Sayaogo, Vehicle Cleaner** *(Paul Koleber)*
  
- 3) **PUBLIC COMMENT** **10 min.**

*Public Comment Note: This is the place on the agenda where the public is invited to address the Authority on any issue. The person speaking is asked to sign-in on the General Public Comment Form for submittal to the Clerk of the Board. Please include your first and last name, a mailing address or a phone number (in the event we need to contact you). When your name is called, step up to the podium and give your name for the audio record. If you are unable to utilize the podium, you will be provided a microphone at your seat. Citizens testifying are asked to limit testimony to three minutes.*

*The Authority will not typically respond to your comments this same evening; however, they may ask some clarifying questions.*
  
- 4) **APPROVAL OF CONSENT AGENDA ITEMS** **1 min.**
  - A. **Approval of Minutes:** January 6, 2016, Regular Meeting; and January 20, 2016, Work Session.
  
  - B. **Payroll:** January 2016 Payroll in the amount of \$2,005,632.91.
  
  - C. **Accounts Payable:** Warrants dated December 11, 2015, numbers 20005-20098, in the amount of \$562,886.73; Warrants dated December 25, 2015, numbers 20101-20155, in the amount of \$495,701.90; Warrants dated December 31, 2015, numbers 20160-20240, in the amount of \$336,982.14; Warrants dated December 31, 2015, numbers 20242-20279, in the amount of \$390,280.69. Automated Clearing House Transfers for December 2015 in the amount of \$16,182.40 for a monthly total of \$1,802,033.86.

Warrants dated January 22, 2016, numbers 20241; 20280-20297 in the amount of \$1,193,402.51; Automated Clearing House Transfers for January 2016 in the amount of \$2,894.55 for a monthly total of \$1,196,297.06.

- |     |  |                |
|-----|--|----------------|
| 5)  | <b>PUBLIC HEARINGS - None</b>  | <b>0 min.</b>  |
| 6)  | <b>COMMITTEE REPORTS</b>   |                |
|     | <b>A. Thurston Regional Planning Council</b> ( <i>Karen Messmer</i> )                | <b>3 min.</b>  |
|     | <b>B. Transportation Policy Board</b> ( <i>Ryan Warner</i> )                         | <b>3 min.</b>  |
|     | <b>C. Citizen Advisory Committee</b> ( <i>Julie Hustoft</i> )                        | <b>3 min.</b>  |
| 7)  | <b>NEW BUSINESS</b>  |                |
|     | <b>A. Dial-A-Lift Customer Satisfaction Survey Results</b> ( <i>Emily Bergkamp</i> ) | <b>30 min.</b> |
|     | <b>B. General Legal Counsel Contract Extension</b> ( <i>Jeff Petterson</i> )         | <b>5 min.</b>  |
|     | <b>C. Federal Advocacy Services</b> ( <i>Katie Cunningham</i> )                      | <b>5 min.</b>  |
|     | <b>D. Annual Authority Reorganizing Activities</b> ( <i>Pat Messmer</i> )            | <b>20 min.</b> |
| 8)  | <b>GENERAL MANAGER'S REPORT</b>  | <b>10 min.</b> |
| 9)  | <b>AUTHORITY ISSUES</b>  | <b>10 min.</b> |
| 10) | <b>EXECUTIVE SESSION - None</b>  | <b>0 min.</b>  |

## **ADJOURNMENT**

*Intercity Transit is committed to ensuring that no person is excluded from participation in, or denied the benefits of its transit services on the basis of race, color, or national origin consistent with requirements of Title VI of the Civil Rights Act of 1964 and Federal Transit Administration guidance in FTA Circular 4702.*

*For questions regarding Intercity Transit's Title VI Program, you may contact the agency's Title VI Officer at (360) 705-5885 or [bholman@intercitytransit.com](mailto:bholman@intercitytransit.com).*

*If you need special accommodations to participate in this meeting, please call us at (360) 705-5860 three days prior to the meeting.*

*For TDD users, please use the state's toll-free relay service, 711 and ask the operator to dial (360) 705-5860.*

*Please consider using an alternate mode to attend this meeting: bike, walk, bus, carpool, or vanpool. This facility is served by Routes 62A, 62B (on Martin Way), and 66 (on Pacific Avenue).*

**Minutes**  
**INTERCITY TRANSIT AUTHORITY**  
**Regular Meeting**  
**January 6, 2016**

**CALL TO ORDER**

Chair Jones called the January 6, 2016, meeting of the Intercity Transit Authority to order at 5:30 p.m., at the administrative offices of Intercity Transit.

**Members Present:** Chair and City of Olympia Councilmember Nathaniel Jones; Vice Chair and Citizen Representative Ryan Warner; Thurston County Commissioner Bud Blake; City of Lacey Councilmember Jeff Gadman; City of Tumwater Councilmember Debbie Sullivan; Citizen Representative Karen Messmer; Citizen Representative Don Melnick; and Labor Representative Ed Bricker.

**Staff Present:** Ann Freeman-Manzanares; Dennis Bloom; Brent Campbell; Katie Cunningham; Donna Feliciano; Laura Lowe; Jim Merrill; Carolyn Newsome; Jeff Peterson; Pat Messmer; Heather Stafford-Smith

**Others Present:** Legal Counsel Dale Kamerrer; Citizen Advisory Committee (CAC) member Jan Burt.

**APPROVAL OF AGENDA**

**It was M/S/A by Citizen Representative Melnick and Citizen Representative Warner to approve the agenda as presented.**

**INTRODUCTIONS**

- A. Joy Gerchak introduced **Lisa Allison, Customer Service Rep.**
- B. Mark Kallas introduced **Jayson Click, Facilities Specialist.**

**PUBLIC COMMENT - None.**

**APPROVAL OF CONSENT AGENDA ITEMS**

**It was M/S/A by Councilmember Gadman and Councilmember Sullivan to approve the consent agenda as presented.**

- A. **Approval of Minutes:** December 2, 2015, Regular Meeting.
- B. **Payroll:** December Payroll in the amount of \$2,902,426.33.
- C. **Surplus Property:** Declared the property listed on Exhibit "A" as surplus.

**PUBLIC HEARING - None.**

## **COMMITTEE REPORTS**

**A. Thurston Regional Planning Council (TRPC).** Karen Messmer said TRPC met December 4, 2015. Members received a presentation by Tom Crawford of the Thurston Climate Action Team (TCAT). She said TCAT members, and Crawford specifically, formed a new working group within the Thurston Thrives umbrella – the health effort in the community. Under that umbrella, a new group was formed with the aim of reducing climate emissions, but connecting that up with health. The survey work is being focused over into a broader working group and the public will see more activity from that group.

On this week's agenda, TRPC will discuss membership in the South Sound Military & Communities Partnership.

**B. Transportation Policy Board (TPB).** Ryan Warner said the TPB met December 9 in an extended meeting. Warner, on behalf of WSDOT's Public Transportation Division, gave a presentation about the current statewide public transportation plan. He said there was a lot of good feedback from TPB about the plan, and they drafted a letter to WSDOT about what they thought of the plan. There is concern with the plan in that it's taking a much broader definition of public transportation than just your typical buses; it's more multimodal focused, but it also addresses single occupancy vehicles as public transportation.

The members also discussed an RTIP Amendment 16-01 repair that would add a new WSDOT project to repair the I-5/93<sup>rd</sup> Avenue SW Bridge. The remainder of the meeting members continued to work on the Regional Transportation Plan update – looking at environmental considerations and public involvement.

Karen Messmer said it would be valuable for the Authority to have a presentation and discussion on the Regional Transportation Plan. Freeman-Manzanares said Jaily Brown is scheduled to present to the Authority and the CAC in February.

**C. Citizen Advisory Committee.** Jan Burt reported the CAC last met in November. Members received two presentations – Leadership APTA by Heather Stafford Smith; and the Walk N Roll Program by Jessica Gould and David Copley. Members then went on a tour of the Maintenance facility. Burt appreciates the tour as it provides a real education about the behind-the-scenes activities.

## **NEW BUSINESS**

**A. 2016 IS Servers.**



## **Intercity Transit Authority Regular Meeting**

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Laura Lowe presented for consideration the purchase of three high-performance servers, a storage array, an upgraded VMWARE software license and additional year of VMWARE maintenance. Lowe said current servers are old and outdated. They will replace five old servers with three new servers with higher processing capacity. IS Manager, Brent Campbell said there will be twice the capability and there will be the ability to move data in an emergency.

**It was M/S/A by Councilmember Gadman and Citizen Representative Messmer to authorize the General Manager to purchase three high-performance servers, a storage array, a VMWARE software license upgrade and a year of VMWARE maintenance from the King County Director's Association (KCDA) master contract for a total purchase price of \$87,979.82, including tax.**

### **B. Towing Services.**

Jeff Peterson presented for consideration two separate two-year contracts with three one-year extension options for towing services. Currently, there is no contract in place with terms and conditions or a set pricing when towing services are needed. Maintenance staff has to quickly find a towing company to bring disabled vehicles back to the shop for service. Staff obtains quotes which become time-consuming. It's been determined that a contract with specific terms that addresses our needs and has a set pricing would be beneficial.

Intercity Transit reserved the right to award contracts based on bid pricing for various towing classes. Class A and B (vans and cut-a-way) vehicles is awarded to Gene's Towing; Class C (coaches) vehicles is awarded to Nisqually Auto and Towing.

**It was M/S/A by Citizen Representative Messmer and Councilmember Sullivan to authorize the General Manager to enter into two 2-year contracts, with three 1-year extension options, with Nisqually Auto and Towing and Gene's Towing for towing services. The estimated initial term value of the contract with Nisqually Auto and Towing is \$27,000. The estimated initial term value of the contract with Gene's Towing is \$7,000.**

### **C. Transit Signal Prioritization Equipment.**

Jeff Peterson presented for consideration a five-year contract to purchase transit signal priority equipment for coaches and traffic control signals.

This purchase is traced back to the development of the Smart Corridors initiative that TRPC undertook over four years ago to upgrade signal boxes and part of that program includes a transit component to get signal prioritization on our coaches.

## **Intercity Transit Authority Regular Meeting**

**January 6, 2016**

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The study resulted in the recommendation of utilizing radio communication technology between a bus and a roadside traffic signal control unit. This contract with ACT Traffic Solutions, Inc. is for bus and traffic signal TSP equipment. Peterson indicated this equipment will not interfere with other emergency vehicles.

Sullivan said if staff runs into any jurisdictional issues, it would be appropriate to discuss that with the corresponding Board member representing that jurisdiction, as they will most likely have insight into this project.

**It was M/S/A by Councilmember Gadman and Citizen Representative Melnick to authorize the General Manager to enter into a five-year contract with ACT Traffic Solutions Inc. to purchase transit signal priority equipment for coaches and traffic control signals. The purchase for equipment is \$280,899, not inclusive of taxes.**

### **D. Vanpool Vehicle Purchase.**

Katie Cunningham presented for consideration the purchase of 33 vanpool vehicles. These are replacement vehicles and staff is not purchasing expansion vehicles at this time. The Puget Sound Regional Council funds will provide 80% funding for 22 vehicles in the amount of \$557,550. Intercity Transit proposes to add the required match from local funds to purchase the remaining 11 vehicles.

Gadman asked why staff selected the Chevrolet Express. Cunningham said Chevrolet meets the "Buy America" standards. Newsome said the Chevys are the only vehicles on the state contract that meet the "Buy America" requirement for federal grant money.

**It was M/S/A by Citizen Representative Melnick and Councilmember Gadman to authorize the General Manager, pursuant to Washington State Contract 03613, to issue a purchase order for the purchase of thirty-three (33) new 12-passenger Chevrolet Express vans from Bud Clary Chevrolet in the amount of \$1,045,407. (Note: Vanpool vehicles are exempt from sales tax.)**

### **E. Adopt Resolution 01-2016 – Discounted Bus Pass Program.**

Freeman-Manzanares said she comes before the Authority to approve a new resolution for the Discounted Bus Pass Program indicating the increase of the level amount from \$200,000 to \$300,000. In addition, the motion passed at the December 2 meeting also included removing the calendar deadline requirement, and Freeman-Manzanares is asking the Authority to consider a new motion to eliminate that calendar deadline. She said from an administrative standpoint, the Authority has allowed staff to have a cut-off date and use a rolling selection process.

## **Intercity Transit Authority Regular Meeting**

**January 6, 2016**

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Gadman, who made the initial motion at the December 2, 2015, meeting, said his intent to remove the calendar deadline was to allow staff the authority to set the deadline where they see fit. The Authority agreed that a new motion was in order.

**It was M/S/A by Councilmember Gadman and Citizen Representative Melnick to adopt Resolution 01-2016, which is meant to supersede the Discounted Pass Program voted upon at the December 2, 2015, meeting; and to give staff the authority to set any calendar deadlines they see fit.**

### **GENERAL MANAGER'S REPORT**

- All are invited to visit the new Bike Shop space where the bike repairs are now done in support of the Earn-A-Bike classes. Stop by Wednesday, January 13 from 4 to 7 p.m. or Saturday, January 16 from 1 to 4 p.m.
- Currently, Intercity Transit has a Federal advocate in Washington D. C. and Freeman-Manzanares asked for the Authority's thoughts about hiring a state advocacy service. It's not in the 2016 budget; however, she is proposing a small contract to focus primarily on additional local options. After some general discussion, the Authority gave staff direction to go forward with this for the 2017 budget.
- Freeman-Manzanares is meeting with Jo Eckert, a member of Patty Murray's staff, here at Intercity Transit on Thursday, January 7, 2016, to talk about federal transportation legislation. Other transit General Managers from the south counties are invited to attend.
- The City of Olympia approved and signed-off on the Development Agreement for the Pattison project. Staff is moving forward and we hope to be in the ground this summer.
- Nathaniel Jones, Debbie Sullivan and Freeman-Manzanares are going to the APTA Legislative conference March 12-16 in Washington D.C.
- Intercity Transit provides Travel Training and Bus Buddies for Senior Services of South Sound and staff received a request from them on how to address their Korean elder group and their transportation issues. Staff met with them on January 5, 2016, and are putting together a presentation in Korean, and are working with the Korean Women's Association to have translators. Staff hopes to have this group of elders riding the bus soon. Travel Training staff is also working with other communities with seniors who may have a language barrier and get them comfortable riding fixed route service.

**Intercity Transit Authority Regular Meeting**

**January 6, 2016**

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- There are 192 active vanpool groups. The Vanpool promotion continues with 65 new riders.

**AUTHORITY ISSUES**

Karen Messmer asked to attend the January 20 work session via phone.

Messmer said TRPC and TBP members attended a special meet-and-greet discussion with Chuck Marohn from Strong Towns. She considered it a very inspirational presentation about how communities work and what makes them prosperous. The mission of Strong Towns is to support a model of development that allows America's cities, towns and neighborhoods to become financially strong and resilient.

Melnick said the Drive Less – Go More campaign at Panorama continues. The Resident Council requested two additional bus stops; there have been several driver training classes, and they are about to use the Rebels by Bus training. Some residents took the train to Centralia. They are forming a steering committee that will meet quarterly to figure out next steps.

Melnick provided a summary of his transportation experience during his trip to Sydney Australia. Sydney’s main modes of transportation are buses, ferries, and trains. The buses look similar to those in the USA. They use honor cards and a prepaid receipt system. Melnick said he noticed there were no school buses. The systems change the designation on some of the buses at certain times of the day, and the buses become designated school buses.

**ADJOURNMENT**

**It was M/S/A by Citizen Representative Messmer and Citizen Representative Warner to adjourn the meeting at 6:38 p.m.**

**INTERCITY TRANSIT AUTHORITY**

**ATTEST**

\_\_\_\_\_  
**Ryan Warner, Vice Chair**

\_\_\_\_\_  
**Pat Messmer  
Clerk to the Authority**

**Date Approved: February 3, 2016.**

Prepared by Pat Messmer, Recording Secretary/  
Executive Assistant, Intercity Transit

**Minutes**  
**INTERCITY TRANSIT AUTHORITY**  
**WORK SESSION**  
**January 20, 2016**

**CALL TO ORDER**

Chair Nathaniel Jones called the January 20, 2016, Work Session of the Intercity Transit Authority to order at 5:31 p.m., at the administrative offices of Intercity Transit.

**Members Present:** Chair and City of Olympia Councilmember Nathaniel Jones; Vice Chair and Citizen Representative Ryan Warner; City of Tumwater Councilmember Debbie Sullivan; City of Lacey Councilmember Jeff Gadman; City of Yelm Councilmember Molly Carmody; City of Olympia Councilmember Clark Gilman; Citizen Representative Don Melnick; and Citizen Representative Karen Messmer (via phone).

**Members Excused:** Thurston County Commissioner Bud Blake; and Labor Representative Ed Bricker.

**Staff Present:** Ann Freeman-Manzanares; Dennis Bloom; David Dudek; Donna Feliciano; Tammy Ferris; Laura Lowe; and Pat Messmer.

**APPROVAL OF AGENDA**

**It was M/S/A by Citizen Representative Ryan Warner and Councilmember Gadman to approve the agenda as presented.**

**INTRODUCTIONS**

Chair Jones welcomed the City of Yelm Councilmember Molly Carmody. He also welcomed on behalf of the City of Olympia, Councilmember Clark Gilman who will represent the city on the Intercity Transit Board.

Councilmember Jones bid farewell to the Intercity Transit Authority. He said he's enjoyed serving on the Board for the last four years. He said the services the agency provides are fundamental to ongoing development of the jurisdictions and communities within Thurston County.

*Jones left the meeting. Citizen Representative and Vice Chair Warner presided over the remainder of the meeting.*

**PUBLIC COMMENT - None.**

## **CITIZEN ADVISORY COMMITTEE REPORT**

Freeman-Manzanares provided the CAC report. She said the CAC met January 11, 2016. The four new CAC members were introduced. Members received a presentation from Tom Crawford who provided the Local Climate Change/Clean Energy Survey Results. They also received the presentation from Laura Lowe on the 2016 Procurement Plan; and they discussed the Discounted Bus Pass Program.

### **2016 PROCUREMENT PLAN**

Procurement/Capital Projects Manager, Laura Lowe, provided a background of the Procurement process and reviewed the list of 2016 projects. She noted staff prepares the list of projects based on the new budget. Staff will present projects/contracts over \$25,000 for Authority approval.

Lowe reviewed a PowerPoint showing slides of the Pattison Expansion Full Buildout and Phases 1 and 2; and the Olympia Transit Center Expansion.

Melnick asked if the building is certified "green." Freeman-Manzanares said staff and the design teams are focused on those standards. She said the question arises whether it's worth the cost it takes to get certification. Intercity Transit's intention is to build as green as possible, however, actual certification is open for question.

Gadman asked if we don't get certified, are we hurting the chances of obtaining future grants. Freeman-Manzanares doesn't believe that is the case. She said for the Pattison Street expansion, the operation of the maintenance facility doesn't necessarily match the certification point scale. The fueling and wash facilities operate with open doors which don't lend themselves to the requirements.

Messmer appreciates staff is working at the national level, and feels we should be able to get highly efficient vehicles in our vanpool fleet. She asked about the level of fuel efficiency regarding the purchase of 33 vanpool replacement vans. Lowe said the challenge in purchasing vanpool vans is we get federal dollars and they have to be Buy America Compliant, and the one company that provides 12-passenger compliant vans is GM; and Bud Clary Dealership is the one chosen for the state contract. Freeman-Manzanares said the budget states we'll purchase 38 vanpools this year. Maintenance and Vanpool staff reviewed the list and decided to purchase only 33 vans. We are focused on providing great service and being good stewards of public funds.

## **BUS STOP PROJECT UPDATE**

Planning Manager, Dennis Bloom, noted a correction to the agenda item #6. Under Section 4 - Background: The last sentence should read, "...over \$1.6 million in bus stop improvements throughout Intercity Transit's service district." Bloom provided an update on Bus Stop Improvements.

### Summary of Current Transit Stop Inventory

- 944 bus stops
- 278 stops with shelters
- 105 stops have benches
- 561 bus stop pole/sign

### Bus Stop Characteristics

- ADA Compliant
  - 721 fully accessible
  - 160 functional
  - 63 not ADA compliant

### Bus Stop Characteristics by Jurisdiction

- 388 in Olympia
- 202 in Lacey
- 116 in Tumwater
- 183 County
- 25 in Yelm
- 30 WSDOT (stops along state highways within the county)

Bloom also reviewed Analysis of Existing Bus Stops; Site Selection Scoring Process; Priorities for Stop Enhancement Funding 2005 - 2016. He noted the cost of enhancements estimated through 2016 is \$1,682,027.

Bloom showed before and after photos of enhanced stops, and land use development examples. He noted the estimated annual cost to maintain a shelter equals \$1,500 per shelter; and the cost for a typical shelter install runs approximately \$16,943. Bloom pointed out other amenity considerations such as solar lighting and bike racks.

An upcoming facilities and stop improvement project to begin in 2016 is at the Tumwater Square Transfer Station. With a CMAQ grant available through the TRPC process, Intercity Transit is partnering with the City of Tumwater to make improvements at this location. The budget: \$31,050 Local, \$198,950 Grant funded. The \$230,000 total budget will make improvements that include increasing the distance for

## **Intercity Transit Authority Work Session**

**January 20, 2016**

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on-street bus bays, widening sidewalks, pedestrian bulb outs at cross walks, improving street lighting and additional shelter pads for bikes and riders.

Messmer encourages the jurisdictions to take a look at their design and land use requirements with respect to connectivity. In relation to development of apartments, etc., the distance the public needs to walk to get to a bus stop is prohibitive for some. And it's important to bring this forward early to the attention of the developers, so design can be made clear early on. We want developers to provide convenient, close access to the various bus stops.

### **BUS / FACILITY CAMERA SYSTEMS OVERVIEW**

Freeman-Manzanares provided an overview of Intercity Transit's mobile and facility camera systems and their capabilities.

She said Intercity Transit receives many compliments from the public and law enforcement about our cameras. Footage is used by law enforcement to help solve crimes, and it's helped the agency address frivolous claims and lawsuits. Prior to the camera install, passenger falls accounted for approximately 80% of claims. The cameras assist with bus operator training, and the cameras help the Washington State Insurance Pool in the aftermath of accidents. Having video footage decreases the cost of reconstructing an accident and can help us determine whether the agency is going to fight a lawsuit or attempt to settle.

The Olympia Transit Center (OTC) has 29 cameras, located mostly outside, and with a few located inside the facility.

There are 14 cameras located at the Lacey Transit Center (LTC).

The Pattison Street facility has 14 cameras.

Fixed Route Dispatch located at the Pattison Street facility has the ability to view live footage from the OTC and LTC. Everything is recorded and there is ability to view later on to assist law enforcement.

There is a video screen located at the Supervisors' Counter in the Maintenance facility that allows staff to see people coming onto property.

Operations Supervisor, David Dudek, assisted with providing actual live footage from the various camera locations. He showed seven samples of footage taken from our bus cameras from past incidents that assisted law enforcement in capturing suspects.



## **Intercity Transit Authority Work Session**

**January 20, 2016**

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The Martin Way Park-and-Ride expanded in 2011 with the installation of 16 cameras which includes license plate recognition.

Hawks Prairie Park-and-Ride opened in 2013. There are 23 cameras at this location which also includes license plate recognition.

Each coach has ten cameras installed. There are 35 Dial-A-Lift vehicles, each with six cameras installed.

### **GENERAL MANAGER'S REPORT**

December's ridership was 317,332 boardings. For 2015, we finished at 4,283,418 boardings, which is down 4.2% from last year's total.

The Walk N Roll Build-a-Bike open house was successful.

Staff tested a 3-position bike rack. It did not get great reviews from bus operators, citing the rack sticks out too far and into the lane. There is concern that when placing bikes onto or off of the bus the tendency is to step into the next lane, plus the rack covers headlights on the bus. Staff will continue to test racks that come onto the market.

At the January 6 meeting, Freeman-Manzanares talked about hiring a state advocate, and found there is a state advocate for Gordon Thomas Honeywell which is the firm we currently use for our Federal advocates.

### **AUTHORITY ISSUES**

Vice Chair Warner reminded everyone that a new Chair and Vice Chair will be elected at the February 3, 2016, meeting.

Warner reminded everyone about the upcoming Bicycle Commuter Contest taking place the first part of February.

### **ADJOURNMENT**

**It was M/S/A by Councilmember Gadman and Citizen Representative Melnick to adjourn the meeting at 7:47 p.m.**

**INTERCITY TRANSIT AUTHORITY**

**ATTEST**

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**Ryan Warner, Vice Chair**

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**Pat Messmer**  
**Clerk of the Board**

**Date Approved: February 3, 2016**

Prepared by Pat Messmer, Recording Secretary/  
Executive Assistant, Intercity Transit

PERIOD DATES: 12/27/15-1/9/16						PERIOD DATES: 1/10/16-1/23/16					
			PAYDATE 1/15/16						PAYDATE 1/29/16		
	CODES		PAY PERIOD CHECK NO.	1ST CHECK AMOUNT	1ST TRANSFER AMOUNT		CODES		PAY PERIOD CHECK NO.	2ND CHECK AMOUNT	2ND TRANSFER AMOUNT
3	FIT		EFT	71,230.47		3	FIT		EFT	71,327.58	
4	MT		EFT	19,960.48	91,190.95	4	MT		EFT	20,051.16	91,378.74
5	A2/35	Life Ins.	Check Dave 2nd	1,598.72	0.00	5	A2/35	Life Ins.	Check Dave 2nd	3,001.74	0.00
6	D3/31	Disability In	Check Dave 2nd	1,753.29	0.00	6	D3/31	Disability In	Check Dave 2nd	2,247.69	0.00
7	HE/37	Health In1st	Check Dave 2nd	16,105.50	0.00	7	HE/37	Health In1st	Check Dave 2nd	293,360.50	0.00
8	TH/39	Taxed Hlth	Check Dave 2nd	0.00	0.00	8	TH/39	Taxed Hlth	Check Dave 2nd	0.00	0.00
9	CC/61	Child Care	Hfstttr/Brgkmp	384.3		9	CC/61	Child Care	Hfstttr/Brgkmp	384.3	
10	GN/08	Garnish	CHECK last	115.38		10	GN/08	Garnish	CHECK last	140.14	
11						11					
12	CS/09	DSHS	EFT	1,873.18	1,873.18	12	CS/09	DSHS	EFT	1,873.18	1,873.18
13	CS/09	ExpertPay	EFT	0.00	0.00	13	CS/09	ExpertPay	EFT	0.00	0.00
14	D1/98	D.Dep. #1	ACH WIRE every	9,039.40	9,039.40	14	D1/98	D.Dep. #1	ACH WIRE every	8,431.55	8,431.55
15	D2/97	D.Dep. #2	ACH WIRE every	15,160.66	15,160.66	15	D2/97	D.Dep. #2	ACH WIRE every	15,171.31	15,171.31
16						16					
16	GT/63	G.Ed.Tuit	Check every	227.00		16	GT/63	G.Ed.Tuit	Check every	227.00	
17	HS/59	Health Svcs	ACH Wire every	95.00	95.00	17	HS/59	Health Svcs	ACH Wire every	125.00	125.00
18	DC/97	Vgrd EE	Wire	41,641.07		18	DC/97	Vgrd EE	Wire	42,465.42	
19	DC/22	Vgrd ER	Wire	28,655.86	70,296.93	19	DC/22	Vgrd ER	Wire	29,476.92	71,942.34
20	L2/29	401k Ln#2	Wire	5,130.18		20	L2/29	401k Ln#2	Wire	5,167.41	
20	LN/29	401k Ln #1	Wire	8,881.19	14,011.37	20	LN/29	401k Ln #1	Wire	8,744.08	13,911.49
22	TTL VNGRD			84,308.30		22	TTL VNGRD			85,853.83	
23	LI/02	L&I	EFT Quarterly	27,068.86		23	LI/02	L&I	EFT Quarterly	27,218.07	
24	MD/51	Mch.UnDue	Check last	1,337.31		24	MD/51	Mch.UnDue	Check last	1,337.44	
25	MI/52	Mac.Initlon	Check last	0.00		25	MI/52	Mac.Initlon	Check last	0.00	
26	MS/60	Payroll Corr	check	0.00		26	MS/60	Payroll Corr	check	0.00	
	GL/11	GTLife		0.00			GL/11	GTLife		0.00	
27	TF/				0.00	27	TF/				0.00
28	TF/	Tx.Fr.Benefit	Employer	50.00	0.00	28	TF/	Tx.Fr.Benefit	Employer	50.00	0.00
29	PA/66	Proj.Assist	Check last	487.00		29	PA/66	Proj.Assist	Check last	487.00	
	PN/04	PERS EE	EFT	43,604.46	0.00	30	PN/04	PERS EE	EFT	43,953.61	0.00
31	PN/04	PERS ER	EFT	79,309.27	122,913.73	31	PN/04	PERS ER	EFT	79,953.47	123,907.08
32	TTL PERS			122,913.73		32	TTL PERS			123,907.08	
33	R3/20	ICMA Ln#2	WIRE	605.39	0.00	33	R3/20	ICMA Ln#2	WIRE	563.18	0.00
	RC/24	ICMA EE	WIRE	5,170.30			RC/24	ICMA EE	WIRE	5,341.10	
35	RI/23	ICMA Roth	WIRE	464.61	464.61	35	RI/23	ICMA Roth	WIRE	514.61	514.61
36	RL/21	ICMA Ln#1	WIRE	1,400.15	2,005.54	36	RL/21	ICMA Ln#1	WIRE	1,400.15	1,963.33
37	RR/25	ICMA ER	WIRE	3,122.89	8,293.19	37	RR/25	ICMA ER	WIRE	3,174.58	8,515.68
38	TTL ICMA			10,298.73	10,763.34	38	TTL ICMA			10,479.01	10,993.62
39	SD/26	457 ST EE	EFT	11,936.64		39	SD/26	457 ST EE	EFT	12,011.96	
40	SR/27	457 ST ER	EFT	7,165.42	19,102.06	40	SR/27	457 ST ER	EFT	7,168.19	19,180.15
41	ST/67	ShTrmDisal	EFT	3,186.43	3,186.43	41	ST/67	ShTrmDisal	EFT	0.00	0.00
42	UC/45	Un COPE	Check 1st	123.00		42	UC/45	Un COPE	Check 1st	-	
	UA/44	Un Assess	Check last	0.00			UA/44	Un Assess	Check last	609.00	
	UD/42	Un Dues	Check last	5,589.89			UD/42	Un Dues	Check last	5,647.72	
44	UI/41	Un Initlatn	Check last	120.00		44	UI/41	Un Initlatn	Check last	120.00	
45	UT/43	Un Tax	Check last	3,070.20		45	UT/43	Un Tax	Check last	0.00	
46	UW/62	United Way	Check last	484.50		46	UW/62	United Way	Check last	460.50	
47	WF/64	Wellness	Check last	354.00		47	WF/64	Wellness	Check last	351.00	
48	NET PAY (dir. Deposit)	ACH Wire eve		446,011.02	446,011.02	48	NET PAY (dir. Deposit)	ACH Wire every		446,852.37	446,852.37
	Paychecks			0.00			Paychecks			3,710.96	
49	TOTAL TRANSFER (tie to Treasurer Notifications)				<b>\$803,644.07</b>	49	TOTAL TRANSFER (tie to Treasurer Notifications)			<b>\$803,766.83</b>	
50	TOTAL PAYROLL*:			<b>\$862,513.02</b>		50	TOTAL PAYROLL*:			<b>\$1,143,119.89</b>	
51	GROSS EARNINGS:			712,562.85		51	GROSS EARNINGS:			726,151.33	
52	EMPR MISC DED:			139,969.93		52	EMPR MISC DED:			406,942.98	
53	EMPR MEDICARE TAX:			9,980.24		53	EMPR MEDICARE TAX:			10,025.58	
54	TOTAL PAYROLL*:			<b>\$862,513.02</b>		54	TOTAL PAYROLL*:			<b>\$1,143,119.89</b>	
55	TOTAL PAYROLL FOR JANUARY 2016					55	TOTAL PAYROLL FOR JANUARY 2016			<b>\$2,005,632.91</b>	
56	ACH WIRE TOTAL			470,306.08		56	ACH WIRE TOTAL			470,580.23	

**Intercity Transit**

**Accounts Payable Check Disbursement List**

Checking Account #: 0040007203

ACCOUNTS PAYABLE WARRANTS

From Date: 12/11/2015

Thru Date: 12/11/2015

Check #	Check Date	Ref #	Name	Amount	Voided
00020005	12/11/2015	01405	ADVANCE GLASS INC	\$163.20	
00020006	12/11/2015	01780	AMALGAMATED TRANSIT UNION 1765	\$123.00	
00020007	12/11/2015	01815	AMERICAN CUSTODIAL INC	\$10,055.00	
00020008	12/11/2015	01960	AMERICAN SEATING COMPANY	\$783.47	
00020009	12/11/2015	02320	APPLIED INDUSTRIAL TECHNOLOGIES	\$161.81	
00020010	12/11/2015	02380	ARAMARK UNIFORM SERVICES	\$768.40	
00020011	12/11/2015	02480	ASE SUPPLY INC	\$50.08	
00020012	12/11/2015	02520	ASI-MODULEX	\$1,696.84	
00020013	12/11/2015	02580	ASSOCIATED PETROLEUM	\$433.75	
00020014	12/11/2015	02990	B&B SIGN COMPANY LLC	\$210.68	
00020015	12/11/2015	03610	BLANCHARD ELECTRIC	\$2,725.44	
00020016	12/11/2015	03680	GALLS, LLC	\$887.04	
00020017	12/11/2015	04040	BUD CLARY CHEVROLET	\$56,946.00	
00020018	12/11/2015	04120	BUILDERS HARDWARE CO	\$516.60	
00020019	12/11/2015	05320	CAPITOL CITY PRESS INC	\$819.60	
00020020	12/11/2015	06040	CITY OF LACEY	\$780.40	
00020021	12/11/2015	06120	CITY OF OLYMPIA UTILITIES	\$5,686.58	
00020022	12/11/2015	06205	CJI RESEARCH CORP	\$25,319.00	
00020023	12/11/2015	06220	CLALLAM TRANSIT SYSTEM	\$1,533.60	
00020024	12/11/2015	06610	COMMERCIAL BRAKE & CLUTCH	\$70.28	
00020025	12/11/2015	07150	CROSSROADS COLLISION CENTER	\$3,614.36	
00020026	12/11/2015	07220	CUMMINS INC	\$30,958.61	
00020027	12/11/2015	09660	FERGUSON ENTERPRISES, INC	\$488.45	
00020028	12/11/2015	10660	GILLIG LLC	\$0.00	<input checked="" type="checkbox"/>
00020029	12/11/2015	10660	GILLIG LLC	\$9,900.63	
00020030	12/11/2015	10758	GORDON THOMAS HONEYWELL GOV AFFAIR	\$6,000.00	
00020031	12/11/2015	10820	GRAPHIC COMMUNICATIONS	\$2,242.56	
00020032	12/11/2015	10990	HANDI-HUT, INC.	\$55,520.00	
00020033	12/11/2015	11615	INDUSTRIAL HYDRAULICS INC	\$8.93	
00020034	12/11/2015	11701	INSLEE, BEST, DOEZIE & RYDER, PS	\$9,898.84	
00020035	12/11/2015	11702	INSPECTORATE AMERICA CORPORATION	\$2,851.54	
00020036	12/11/2015	11765	INTERCITY TRANSIT PETTY CASH	\$597.26	
00020037	12/11/2015	11810	INTERSTATE BATTERY	\$280.54	
00020038	12/11/2015	11905	JANEK CORPORATION	\$701.76	
00020039	12/11/2015	11930	JERRYS AUTOMOTIVE TOWING	\$335.10	
00020040	12/11/2015	13440	LAW LYMAN DANIEL KAMERRER BOGDANOVI	\$580.00	
00020041	12/11/2015	13485	LEMAY MOBILE SHREDDING	\$188.30	
00020042	12/11/2015	13510	LES SCHWAB TIRE CENTER	\$122.52	
00020043	12/11/2015	13555	LIBBY ENVIRONMENTAL, LLC	\$80.00	
00020044	12/11/2015	13740	MAGELLAN BEHAVIORAL HEALTH	\$1,852.20	
00020045	12/11/2015	13750	MAILBOX OF OLYMPIA	\$500.00	
00020046	12/11/2015	14440	MICROFLEX	\$1,305.60	
00020047	12/11/2015	14590	MOHAWK MFG & SUPPLY	\$82.29	
00020048	12/11/2015	14750	MULLINAX FORD	\$516.60	
00020049	12/11/2015	14900	NAPA AUTO PARTS	\$457.53	
00020050	12/11/2015	15090	NELSON TRUCK	\$217.83	
00020051	12/11/2015	15140	NISQUALLY TOWING SERVICE	\$1,598.54	
00020052	12/11/2015	16490	PACIFIC DISPOSAL INC	\$618.74	
00020053	12/11/2015	16595	PACIFIC POWER GROUP LLC	\$10,935.12	
00020054	12/11/2015	16695	PATTISON WATER COMPANY	\$87.80	
00020055	12/11/2015	16765	PETRO CARD	\$30,719.68	
00020056	12/11/2015	16820	PIERCE COUNTY SECURITY	\$14,704.89	
00020057	12/11/2015	16874	PITNEY BOWES RESERVE ACCOUNT	\$500.00	
00020058	12/11/2015	17290	PUGET SOUND ENERGY	\$20,645.99	

## Accounts Payable Check Disbursement List

Checking Account #: 0040007203

ACCOUNTS PAYABLE WARRANTS

From Date: 12/11/2015

Thru Date: 12/11/2015

Check #	Check Date	Ref #	Name	Amount	Voided
00020059	12/11/2015	17391	QUALITY MUFFLER & BRAKE	\$522.24	
00020060	12/11/2015	17392	QUALITY PARKING LOT SERVICES LLC	\$1,256.64	
00020061	12/11/2015	17420	R&R TIRE COMPANY, INC.	\$3,835.20	
00020062	12/11/2015	17505	RAINIER DODGE INC	\$615.26	
00020063	12/11/2015	17560	RE AUTO ELECTRIC INC	\$455.81	
00020064	12/11/2015	17795	ROUTEMATCH SOFTWARE INC	\$40,423.77	
00020065	12/11/2015	17840	SAFELITE AUTOGLASS	\$304.47	
00020066	12/11/2015	17900	SCHETKY NW SALES INC	\$311.96	
00020067	12/11/2015	17965	SEATTLE AUTOMOTIVE DIST.	\$1,453.54	
00020068	12/11/2015	18068	SHINING EXAMPLE INC	\$303.33	
00020069	12/11/2015	18145	SIX ROBBLEES INC	\$167.59	
00020070	12/11/2015	18470	SPORTWORKS NORTHWEST INC	\$710.15	
00020071	12/11/2015	18610	STEPHAN J PARROTT	\$675.00	
00020072	12/11/2015	18648	STORAGELAND LLC	\$6,325.00	
00020073	12/11/2015	18651	STORMANS (LICENSING)	\$95.50	
00020074	12/11/2015	18705	SUNBELT RENTALS	\$452.39	
00020075	12/11/2015	21736	THURSTON COUNTY FOOD BANK	\$250.00	
00020076	12/11/2015	21790	THURSTON COUNTY PUBLIC WORKS	\$165.84	
00020077	12/11/2015	21930	TIRES INC	\$3,257.97	
00020078	12/11/2015	21950	TITUS-WILL CHEVROLET	\$4,088.26	
00020079	12/11/2015	21975	TOSSEY, KATHERINE	\$42.98	
00020080	12/11/2015	21980	TOTAL BATTERY & AUTOMOTIVE SUPPLY	\$127.95	
00020081	12/11/2015	21985	TOTAL FILTRATION SERVICES	\$297.17	
00020082	12/11/2015	22010	TOYOTA OF OLYMPIA	\$98.26	
00020083	12/11/2015	22100	TRANSIT SOLUTIONS, LLC	\$563.63	
00020084	12/11/2015	22325	TTL PARTNERS LLC	\$3,397.00	
00020085	12/11/2015	22420	TUMWATER PRINTING	\$952.88	
00020086	12/11/2015	23400	U S BANK CORPORATE PAYMENT SYSTEMS	\$119,153.12	
00020087	12/11/2015	23405	U S BANK or CORPORATE PAYMENT SYSTEM	\$5,776.17	
00020088	12/11/2015	23410	U S BANK VOYAGER FLEET SYSTEMS	\$25,945.58	
00020089	12/11/2015	23740	USSC LLC	\$1,353.32	
00020090	12/11/2015	23790	VENTILATION POWER INC	\$2,401.06	
00020091	12/11/2015	24000	W W GRAINGER INC	\$1,582.68	
00020092	12/11/2015	24140	WA ST DEPT OF ENTERPRISE SERVICES	\$448.84	
00020093	12/11/2015	24742	WA ST EMPLOYMENT SECURITY	\$23.44	
00020094	12/11/2015	24750	WA ST GET PROGRAM	\$227.00	
00020095	12/11/2015	25130	WALTER E NELSON CO OF WESTERN WA	\$1,506.23	
00020096	12/11/2015	25380	WASHINGTON GARDENS	\$315.52	
00020097	12/11/2015	25858	WESTCARE CLINIC LLC PS	\$414.00	
00020098	12/11/2015	25920	WEYERHAEUSER NR COMPANY	\$13,747.00	
				<b>Total:</b>	<b>\$562,886.73</b>

## Intercity Transit

## Accounts Payable Check Disbursement List

Checking Account #: 0040007203

ACCOUNTS PAYABLE WARRANTS

From Date: 12/25/2015

Thru Date: 12/25/2015

Check #	Check Date	Ref #	Name	Amount	Voided
00020101	12/25/2015	01305	ACCESS INFORMATION PROTECTED	\$609.52	
00020102	12/25/2015	01405	ADVANCE GLASS INC	\$163.20	
00020103	12/25/2015	01820	AMERICAN DRIVING RECORDS INC	\$452.06	
00020104	12/25/2015	01885	AMERICAN LANDSCAPE SERVICES, LLC	\$3,916.80	
00020105	12/25/2015	01895	AMERICAN PETROLEUM ENVIRONMENTAL S	\$408.08	
00020106	12/25/2015	01960	AMERICAN SEATING COMPANY	\$296.05	
00020107	12/25/2015	02320	APPLIED INDUSTRIAL TECHNOLOGIES	\$351.43	
00020108	12/25/2015	02380	ARAMARK UNIFORM SERVICES	\$772.46	
00020109	12/25/2015	02580	ASSOCIATED PETROLEUM	\$2,100.22	
00020110	12/25/2015	02990	B&B SIGN COMPANY LLC	\$909.00	
00020111	12/25/2015	06060	CITY OF OLYMPIA	\$749.51	
00020112	12/25/2015	06610	COMMERCIAL BRAKE & CLUTCH	\$254.42	
00020113	12/25/2015	07150	CROSSROADS COLLISION CENTER	\$1,478.75	
00020114	12/25/2015	07220	CUMMINS INC	\$0.00	<input checked="" type="checkbox"/>
00020115	12/25/2015	07220	CUMMINS INC	\$20,476.38	
00020116	12/25/2015	08780	EMERALD SERVICES INC	\$524.46	
00020117	12/25/2015	09205	EXTENDED RANGE WEATHER CO INC	\$275.00	
00020118	12/25/2015	09575	FASTENAL COMPANY	\$21.98	
00020119	12/25/2015	10180	FREEDMAN SEATING CORPORATION	\$73.20	
00020120	12/25/2015	10477	GALLS, LLC	\$507.99	
00020121	12/25/2015	10660	GILLIG LLC	\$0.00	<input checked="" type="checkbox"/>
00020122	12/25/2015	10660	GILLIG LLC	\$19,134.72	
00020123	12/25/2015	10820	GRAPHIC COMMUNICATIONS	\$706.27	
00020124	12/25/2015	11175	HEALTH CARE AUTHORITY	\$332,591.48	
00020125	12/25/2015	11810	INTERSTATE BATTERY	\$97.87	
00020126	12/25/2015	11825	INTRACOMMUNICATION NETWORK SYSTEM	\$2,332.67	
00020127	12/25/2015	11865	ISLAND SUPERIOR AIR FILTER	\$440.80	
00020128	12/25/2015	11905	JANEK CORPORATION	\$544.00	
00020129	12/25/2015	12915	KRXY OLYMPIA BROADCASTERS INC	\$1,500.00	
00020130	12/25/2015	13510	LES SCHWAB TIRE CENTER	\$228.70	
00020131	12/25/2015	13661	LOOMIS	\$416.40	
00020132	12/25/2015	14750	MULLINAX FORD	\$492.43	
00020133	12/25/2015	14760	MUNCIE TRANSIT SUPPLY	\$49.96	
00020134	12/25/2015	14900	NAPA AUTO PARTS	\$916.12	
00020135	12/25/2015	15140	NISQUALLY TOWING SERVICE	\$291.33	
00020136	12/25/2015	15217	NORTHWEST EVENT DEOCRATORS	\$285.60	
00020137	12/25/2015	15255	NORTHWEST PUMP & EQUIPMENT	\$605.54	
00020138	12/25/2015	16593	PACIFIC OFFICE AUTOMATION	\$1,404.21	
00020139	12/25/2015	16595	PACIFIC POWER GROUP LLC	\$340.06	
00020140	12/25/2015	16680	PARTSMASTER	\$1,737.74	
00020141	12/25/2015	16765	PETRO CARD	\$58,815.26	
00020142	12/25/2015	16830	PIERCE TRANSIT	\$26,756.91	
00020143	12/25/2015	17505	RAINIER DODGE INC	\$525.89	
00020144	12/25/2015	17560	RE AUTO ELECTRIC INC	\$991.03	
00020145	12/25/2015	17840	SAFELITE AUTOGLASS	\$866.27	
00020146	12/25/2015	17900	SCHETKY NW SALES INC	\$328.54	
00020147	12/25/2015	17965	SEATTLE AUTOMOTIVE DIST.	\$535.33	
00020148	12/25/2015	18075	SIEGEL OIL COMPANY	\$114.30	
00020149	12/25/2015	18145	SIX ROBBLEES INC	\$380.59	
00020150	12/25/2015	18470	SPORTWORKS NORTHWEST INC	\$208.67	
00020151	12/25/2015	18705	SUNBELT RENTALS	\$1,067.52	
00020152	12/25/2015	18720	SUPER BEE WHEEL ALIGNMENT	\$104.49	
00020153	12/25/2015	18755	S-SQUARE TUBE PRODUCTS	\$408.85	
00020154	12/25/2015	21950	TITUS-WILL CHEVROLET	\$4,349.74	

# Intercity Transit

## Accounts Payable Check Disbursement List

Checking Account #: 0040007203

ACCOUNTS PAYABLE WARRANTS

From Date: 12/25/2015

Thru Date: 12/25/2015

Check #	Check Date	Ref #	Name	Amount	Voided
00020155	12/25/2015	22320	TSS DIGITAL SERVICES INC	\$1,500.00	
00020156	12/25/2015	24742	WA ST EMPLOYMENT SECURITY	\$65.10	
00020157	12/25/2015	24750	WA ST GET PROGRAM	\$227.00	
				<b>Total:</b>	
				\$495,701.90	

# Intercity Transit

## Accounts Payable Check Disbursement List

Checking Account #: 0040007203

ACCOUNTS PAYABLE WARRANTS

From Date: 12/31/2015

Thru Date: 12/31/2015

Check #	Check Date	Ref #	Name	Amount	Voided
00020160	12/31/2015	01230	A WORKSAFE SERVICE INC	\$400.00	
00020161	12/31/2015	01405	ADVANCE GLASS INC	\$217.60	
00020162	12/31/2015	01780	AMALGAMATED TRANSIT UNION 1765	\$20,971.47	
00020163	12/31/2015	01805	AMB TOOLS AND EQUIPMENT CO INC	\$783.96	
00020164	12/31/2015	02320	APPLIED INDUSTRIAL TECHNOLOGIES	\$78.71	
00020165	12/31/2015	02380	ARAMARK UNIFORM SERVICES	\$761.58	
00020166	12/31/2015	02580	ASSOCIATED PETROLEUM	\$520.63	
00020167	12/31/2015	02825	AUTO PLUS - OLYMPIA	\$213.24	
00020168	12/31/2015	02990	B&B SIGN COMPANY LLC	\$75.09	
00020169	12/31/2015	03610	BLANCHARD ELECTRIC	\$3,633.92	
00020170	12/31/2015	03705	BNSF RAILWAY COMPANY	\$4,335.00	
00020171	12/31/2015	04120	BUILDERS HARDWARE CO	\$545.97	
00020172	12/31/2015	05260	CAPITAL INDUSTRIAL INC	\$20.24	
00020173	12/31/2015	05305	CAPITOL ALARM INC	\$315.66	
00020174	12/31/2015	05340	CAPITOL COURIER SERVICE	\$315.87	
00020175	12/31/2015	05435	CARLSON, SYLVIA	\$10.01	
00020176	12/31/2015	05460	CARQUEST AUTO PARTS-OLYMPIA	\$18.91	
00020177	12/31/2015	06040	CITY OF LACEY	\$659.98	
00020178	12/31/2015	06120	CITY OF OLYMPIA UTILITIES	\$4,091.55	
00020179	12/31/2015	06610	COMMERCIAL BRAKE & CLUTCH	\$730.48	
00020180	12/31/2015	07150	CROSSROADS COLLISION CENTER	\$2,294.73	
00020181	12/31/2015	07220	CUMMINS INC	\$5,880.33	
00020182	12/31/2015	08720	ELECTRONIC RESOURCING INC	\$67.52	
00020183	12/31/2015	08780	EMERALD SERVICES INC	\$87.00	
00020184	12/31/2015	08840	EMPLOYER RESOURCES NORTHWEST	\$6,484.87	
00020185	12/31/2015	09805	FLEET PRIDE	\$195.15	
00020186	12/31/2015	10477	GALLS, LLC	\$0.00	<input checked="" type="checkbox"/>
00020187	12/31/2015	10477	GALLS, LLC	\$2,133.44	
00020188	12/31/2015	10607	GENUINE AUTO GLASS	\$619.95	
00020189	12/31/2015	10660	GILLIG LLC	\$0.00	<input checked="" type="checkbox"/>
00020190	12/31/2015	10660	GILLIG LLC	\$14,253.33	
00020191	12/31/2015	10863	GRAYS HARBOR TRANSIT	\$220.00	
00020192	12/31/2015	11615	INDUSTRIAL HYDRAULICS INC	\$340.87	
00020193	12/31/2015	11765	INTERCITY TRANSIT PETTY CASH	\$502.83	
00020194	12/31/2015	11810	INTERSTATE BATTERY	\$268.63	
00020195	12/31/2015	12870	KONE INC.	\$512.44	
00020196	12/31/2015	13510	LES SCHWAB TIRE CENTER	\$107.31	
00020197	12/31/2015	13850	MASON TRANSIT AUTHORITY	\$750.00	
00020198	12/31/2015	14160	MCMASTER-CARR SUPPLY CO.	\$134.24	
00020199	12/31/2015	14405	MICHAEL G MALAIER, TRUSTEE	\$346.14	
00020200	12/31/2015	14590	MOHAWK MFG & SUPPLY	\$66.20	
00020201	12/31/2015	14613	MOORE & ASSOCIATES INC	\$9,295.74	
00020202	12/31/2015	14750	MULLINAX FORD	\$4,826.90	
00020203	12/31/2015	14900	NAPA AUTO PARTS	\$988.08	
00020204	12/31/2015	15140	NISQUALLY TOWING SERVICE	\$71.21	
00020205	12/31/2015	15269	NORTHWEST TRUCK & INDUSTRIAL INC	\$328.14	
00020206	12/31/2015	16557	PACIFIC MODULAR, INC	\$489.60	
00020207	12/31/2015	16593	PACIFIC OFFICE AUTOMATION	\$1,799.99	
00020208	12/31/2015	16595	PACIFIC POWER GROUP LLC	\$513.27	
00020209	12/31/2015	16695	PATTISON WATER COMPANY	\$90.41	
00020210	12/31/2015	16765	PETRO CARD	\$12,719.26	
00020211	12/31/2015	16820	PIERCE COUNTY SECURITY	\$15,323.02	
00020212	12/31/2015	16841	PIONEER FIRE & SECURITY INC	\$253.00	
00020213	12/31/2015	17392	QUALITY PARKING LOT SERVICES LLC	\$1,256.64	



**Intercity Transit**

**Accounts Payable Check Disbursement List**

Checking Account #: 0040007203

ACCOUNTS PAYABLE WARRANTS

From Date: 12/31/2015

Thru Date: 12/31/2015

Check #	Check Date	Ref #	Name	Amount	Voided
00020214	12/31/2015	17505	RAINIER DODGE INC	\$464.08	
00020215	12/31/2015	17683	REMIX SOFTWARE INC	\$13,520.00	
00020216	12/31/2015	17840	SAFELITE AUTOGLASS	\$378.72	
00020217	12/31/2015	17900	SCHETKY NW SALES INC	\$825.11	
00020218	12/31/2015	17965	SEATTLE AUTOMOTIVE DIST.	\$1,124.15	
00020219	12/31/2015	18068	SHINING EXAMPLE INC	\$303.33	
00020220	12/31/2015	18160	SKILLINGS CONNOLLY INC	\$3,232.35	
00020221	12/31/2015	18355	SOUND TRANSIT	\$80,520.17	
00020222	12/31/2015	18420	SOUTHGATE FENCE INC	\$367.74	
00020223	12/31/2015	18695	SUMMIT LAW GROUP PLLC	\$756.00	
00020224	12/31/2015	18720	SUPER BEE WHEEL ALIGNMENT	\$208.98	
00020225	12/31/2015	18940	TENNANT COMPANY	\$1,064.83	
00020226	12/31/2015	21610	TETRA TECH INC	\$14,273.61	
00020227	12/31/2015	21660	THERMO KING NORTHWEST	\$2,129.64	
00020228	12/31/2015	21930	TIRES INC	\$12,778.81	
00020229	12/31/2015	21950	TITUS-WILL CHEVROLET	\$311.65	
00020230	12/31/2015	21980	TOTAL BATTERY & AUTOMOTIVE SUPPLY	\$127.95	
00020231	12/31/2015	22010	TOYOTA OF OLYMPIA	\$476.09	
00020232	12/31/2015	22100	TRANSIT SOLUTIONS, LLC	\$455.76	
00020233	12/31/2015	23400	U S BANK CORPORATE PAYMENT SYSTEMS	\$76,856.28	
00020234	12/31/2015	23660	UNITED WAY OF THURSTON COUNTY	\$1,421.50	
00020235	12/31/2015	23755	VALLEY FREIGHTLINER	\$516.82	
00020236	12/31/2015	24000	W W GRAINGER INC	\$157.46	
00020237	12/31/2015	24305	WA ST DEPT OF L & I SAFETY & HEALTH	\$1,200.00	
00020238	12/31/2015	24750	WA ST GET PROGRAM	\$227.00	
00020239	12/31/2015	25275	WASHINGTON ASSOC OF PUBLIC RECORDS	\$100.00	
00020240	12/31/2015	25858	WESTCARE CLINIC LLC PS	\$1,264.00	
			<b>Total:</b>	<b>\$336,982.14</b>	

# Intercity Transit

## Accounts Payable Check Disbursement List

Checking Account #: 0040007203

ACCOUNTS PAYABLE WARRANTS

From Date: 12/31/2015

Thru Date: 12/31/2015

Check #	Check Date	Ref #	Name	Amount	Voided
00020242	12/31/2015	01305	ACCESS INFORMATION PROTECTED	\$360.05	
00020243	12/31/2015	01733	ALPHA GRAPHICS	\$172.67	
00020244	12/31/2015	01815	AMERICAN CUSTODIAL INC	\$10,055.00	
00020245	12/31/2015	01820	AMERICAN DRIVING RECORDS INC	\$209.74	
00020246	12/31/2015	02060	AMERISAFE	\$53.86	
00020247	12/31/2015	02320	APPLIED INDUSTRIAL TECHNOLOGIES	\$188.12	
00020248	12/31/2015	04040	BUD CLARY CHEVROLET	\$227,879.00	
00020249	12/31/2015	05220	CAPITAL ÉLECTRIC INC	\$369.91	
00020250	12/31/2015	06120	CITY OF OLYMPIA UTILITIES	\$2,576.00	
00020251	12/31/2015	07150	CROSSROADS COLLISION CENTER	\$2,539.83	
00020252	12/31/2015	07220	CUMMINS INC	\$14,147.61	
00020253	12/31/2015	10477	GALLS, LLC	\$2,164.04	
00020254	12/31/2015	10660	GILLIG LLC	\$0.00	✓
00020255	12/31/2015	10660	GILLIG LLC	\$10,899.33	
00020256	12/31/2015	10758	GORDON THOMAS HONEYWELL GOV AFFAIR	\$6,000.00	
00020257	12/31/2015	10820	GRAPHIC COMMUNICATIONS	\$100.10	
00020258	12/31/2015	11498	IBI GROUP, US	\$13,653.53	
00020259	12/31/2015	11810	INTERSTATE BATTERY	\$110.92	
00020260	12/31/2015	12870	KONE INC.	\$512.44	
00020261	12/31/2015	13440	LAW LYMAN DANIEL KAMERRER BOGDANOVI	\$420.80	
00020262	12/31/2015	13485	LEMAY MOBILE SHREDDING	\$61.80	
00020263	12/31/2015	13661	LOOMIS	\$402.57	
00020264	12/31/2015	15140	NISQUALLY TOWING SERVICE	\$582.66	
00020265	12/31/2015	16490	PACIFIC DISPOSAL INC	\$629.86	
00020266	12/31/2015	16765	PETRO CARD	\$28,224.48	
00020267	12/31/2015	17290	PUGET SOUND ENERGY	\$20,548.00	
00020268	12/31/2015	17505	RAINIER DODGE INC	\$553.69	
00020269	12/31/2015	17560	RE AUTO ELECTRIC INC	\$297.25	
00020270	12/31/2015	17900	SCHETKY NW SALES INC	\$192.33	
00020271	12/31/2015	17965	SEATTLE AUTOMOTIVE DIST.	\$345.42	
00020272	12/31/2015	18160	SKILLINGS CONNOLLY INC	\$15,274.81	
00020273	12/31/2015	18470	SPORTWORKS NORTHWEST INC	\$47.76	
00020274	12/31/2015	21950	TITUS-WILL CHEVROLET	\$929.98	
00020275	12/31/2015	23410	U S BANK VOYAGER FLEET SYSTEMS	\$27,917.36	
00020276	12/31/2015	24040	WA ST CONSOLIDATED TECHNOLOGY SERVI	\$124.25	
00020277	12/31/2015	24740	WA ST EMPLOYMENT SECURITY DEPARTME	\$1,199.00	
00020278	12/31/2015	25380	WASHINGTON GARDENS	\$451.52	
00020279	12/31/2015	25858	WESTCARE CLINIC LLC PS	\$85.00	

**Total: \$390,280.69**

**Intercity Transit**  
**Accounts Payable Cash Requirements**

Div #	Reference #	Tr Cd	Due Date	Discount Date	Discount Amount	Invoice Amount	Payment Amount	Vendor Total	Sp Ck	Cash Required
<b>11775 INTERCITY TRANSIT WELLNESS</b>										
00	S272167	DI	12/31/2015			1,559.97	1,559.97	1,559.97		1,559.97
00	S287538	DI	12/31/2015			1,018.50	1,018.50	2,578.47		2,578.47

**Intercity Transit**  
**Accounts Payable Cash Requirements**

Div #	Reference #	Tr Cd	Due Date	Discount Date	Discount Amount	Invoice Amount	Payment Amount	Vendor Total	Sp Ck	Cash Required
<b>06270 CLAUS, DIANA</b>										
00	2015/NOV-DEC	DI	12/31/2015			46.63	46.63	46.63		46.63
<b>08005 DIRITO CHRISTINE</b>										
00	09/18/2015	DI	12/31/2015			80.27	80.27	80.27		126.90
<b>11308 HOFSTETTER SHANNON</b>										
00	12/31/15	DI	12/31/2015			192.30	192.30	192.30		319.20
<b>11355 HOOSIER, CAROL</b>										
00	2015 MILEAGE	DI	12/31/2015			336.49	336.49	336.49		655.69
<b>11740 INTERCITY TRANSIT ADVANCED TRAVEL</b>										
00	09/2015	DI	12/31/2015			272.00	272.00	272.00		927.69
<b>11750 INTERCITY TRANSIT EXEC IMPREST ACCOU</b>										
00	2015DEC	CM	12/31/2015			-1,584.60	-1,584.60	-1,584.60		-656.91
00	2015DEC	DI	12/31/2015			2,492.50	2,492.50	907.90		1,835.59
<b>11760 INTERCITY TRANSIT IMPREST ACCOUNT</b>										
00	2015DEC	DI	12/31/2015			709.50	709.50	709.50		2,545.09
<b>11770 INTERCITY TRANSIT PROJECT ASSISTANCE</b>										
00	2015DEC	DI	12/31/2015			1,461.00	1,461.00	1,461.00		4,006.09
<b>11775 INTERCITY TRANSIT WELLNESS</b>										
00	2015DEC	DI	12/31/2015			1,047.00	1,047.00	1,047.00		5,053.09

**Intercity Transit**  
**Accounts Payable Cash Requirements**

Div #	Reference #	Tr Cd	Due Date	Discount Date	Discount Amount	Invoice Amount	Payment Amount	Vendor Total	Sp Ck	Cash Required
<b>05105 CALQUHOUN, GREG</b>										
00	11/29-12/4/15	DI	12/25/2015			1,234.20	1,234.20	1,234.20		1,234.20
<b>08005 DIRITO CHRISTINE</b>										
00	12/2/2015	DI	12/25/2015			57.10	57.10	57.10		1,291.30
<b>11308 HOFSTETTER SHANNON</b>										
00	12/18/15	DI	12/25/2015			192.30	192.30	192.30		1,483.60
<b>11740 INTERCITY TRANSIT ADVANCED TRAVEL</b>										
00	12/2015	DI	12/25/2015			2,987.34	2,987.34	2,987.34		4,470.94

**Intercity Transit**  
**Accounts Payable Cash Requirements**

Div #	Reference #	Tr Cd	Due Date	Discount Date	Discount Amount	Invoice Amount	Payment Amount	Vendor Total	Sp Ck	Cash Required
<b>11308 HOFSTETTER SHANNON</b>										
00	12/4/15	DI	12/11/2015			192.30	192.30	192.30		192.30
<b>11355 HOOSIER, CAROL</b>										
00	03369D	DI	12/11/2015			173.91	173.91	173.91		366.21
<b>11760 INTERCITY TRANSIT IMPREST ACCOUNT</b>										
00	12/07/15	DI	12/11/2015			961.08	961.08	961.08		1,327.29
<b>11785 INTERNATIONAL ASSOCIATION OF MACHINIS</b>										
00	2015DEC	DI	12/11/2015			2,662.12	2,662.12	2,662.12		3,989.41
<b>11925 JENKINS SHANNIE</b>										
00	2015 DEC MILEAGE	DI	12/11/2015			90.49	90.49	90.49		4,079.90

**Intercity Transit**

**Accounts Payable Check Disbursement List**

Checking Account #: 0040007203

ACCOUNTS PAYABLE WARRANTS

From Date: 01/22/2016

Thru Date: 01/22/2016

Check #	Check Date	Ref #	Name	Amount	Voided
00020241	1/22/2016	23405	U S BANK or CORPORATE PAYMENT SYSTEM	\$434.27	
00020280	1/22/2016	01780	AMALGAMATED TRANSIT UNION 1765	\$123.00	
00020281	1/22/2016	04040	BUD CLARY CHEVROLET	\$57,136.00	
00020282	1/22/2016	05340	CAPITOL COURIER SERVICE	\$365.75	
00020283	1/22/2016	06060	CITY OF OLYMPIA	\$1,736.75	
00020284	1/22/2016	06760	COMMUNITY TRANSPORTATION ASSOC NW	\$400.00	
00020285	1/22/2016	09205	EXTENDED RANGE WEATHER CO INC	\$275.00	
00020286	1/22/2016	09820	FLEET-NET CORP	\$5,238.72	
00020287	1/22/2016	10660	GILLIG LLC	\$553.23	
00020288	1/22/2016	16873	PITNEY BOWES GLOBAL FINANCIAL SERV LL	\$228.48	
00020289	1/22/2016	16874	PITNEY BOWES RESERVE ACCOUNT	\$600.00	
00020290	1/22/2016	18610	STEPHAN J PARROTT	\$675.00	
00020291	1/22/2016	21640	THE BUS COALITION	\$500.00	
00020292	1/22/2016	21760	THURSTON COUNTY COMMUNICATIONS	\$43,002.82	
00020293	1/22/2016	21880	THURSTON REGIONAL PLANNING COUNCIL	\$9,372.25	
00020294	1/22/2016	22325	TTL PARTNERS LLC	\$3,397.00	
00020295	1/22/2016	24750	WA ST GET PROGRAM	\$227.00	
00020296	1/22/2016	25580	WASHINGTON STATE TRANSIT INSURANCE	\$1,065,351.00	
00020297	1/22/2016	26405	XIOLOIX LLC	\$3,786.24	
			<b>Total:</b>	\$1,193,402.51	

**Intercity Transit**  
**Accounts Payable Cash Requirements**

Div #	Reference #	Tr Cd	Due Date	Discount Date	Discount Amount	Invoice Amount	Payment Amount	Vendor Total	Sp Ck	Cash Required
<b>11308 HOFSTETTER SHANNON</b>										
00	01/15/16	DI	1/22/2016			192.30	192.30	192.30		192.30
<b>11785 INTERNATIONAL ASSOCIATION OF MACHINIS</b>										
00	2016JAN	DI	1/22/2016			2,702.25	2,702.25	2,702.25		2,894.55



## TRPC Members & Representatives

**City of Lacey**  
Virgil Clarkson

**City of Olympia**  
Nathaniel Jones

**City of Rainier**  
Everett Gage

**City of Tenino**  
pending

**City of Tumwater**  
Tom Oliva

**City of Yelm**  
Robert Isom

**Confederated Tribes of the Chehalis Reservation**  
Amy Loudermilk

**Nisqually Indian Tribe**  
Heidi Thomas

**Town of Bucoda**  
Alan Vanell

**Thurston County**  
Sandra Romero

**North Thurston Public Schools**  
Chuck Namit

**Olympia School District**  
pending

**Intercity Transit**  
Karen Messmer

**LOTT Clean Water Alliance**  
Cynthia Pratt

**Port of Olympia**  
pending

**PUD No. 1 of Thurston County**  
Russell Olsen

### Associate Members

**Economic Development Council of Thurston County**  
Michael Cade

**Lacey Fire District #3**  
Gene Dobry

**Puget Sound Regional Council**  
Vacant

**The Evergreen State College**  
Jeanne Rynne

**Timberland Regional Library**  
Bill Wilson



REGIONAL VISION • COOPERATION • INFORMATION

## PRE-AGENDA Friday, February 5, 2016 8:30 a.m. – 11:00 a.m.

The TRPC pre-agenda provides our members the opportunity to review the topics of the upcoming TRPC meeting. This information is forwarded in advance to afford your councils and boards the opportunity for discussion at your regular meetings. This will provide your designated representative with information that can be used for their participation in the Regional Council meeting. For more information, please visit our website at [www.trpc.org](http://www.trpc.org).

### Consent Calendar

**ACTION**

These items were presented at the previous meeting. They are action items and will remain on consent unless pulled for further discussion.

- a. Approval of Minutes – January 8, 2016
- b. Approval of Vouchers
- c. 2015 Financial Report

### Mobile Integrated Healthcare Programs

**PRESENTATION**

Many fire service agencies are experiencing dramatic increases in the volume of medical incident responses. Changes in healthcare legislation and insurance, increases in homelessness, a lack of adequate mental and behavioral health resources within the community, along with a general growth in population are all believed to be contributing factors. This presentation will summarize the evaluation and planning work that has already been conducted by Lacey Fire District 3 and the Olympia Fire Department, in partnership with Medic One, and identify strategies for future pilot programs that could be conducted locally to help address these healthcare system issues.

### TRPC 2016 Meeting Calendar

**ACTION**

Council Members will review and approve the 2016 Meeting Calendar.

### Appointment of Executive Director's Evaluation Committee

**ACTION**

The chair will appoint Council Members to the Executive Director Evaluation Committee.

### Zero Net Loss of Farmland

**INFORMATION / DISCUSSION**

The Council and the Sustainable Thurston Plan called for protection of agricultural lands. Staff will report on a regional forum that suggested various strategies.

### 2016 Legislative Session

**DISCUSSION**

Staff will provide additional information on issues of potential interest to the Council that require state legislative assistance and support.

### 2016 Officer Elections

**ACTION**

If February each year, Regional Council Members hold elections for Chair, Vice-chair and Secretary for a one-year term.

### Report from Outside Committee Assignments

**INFORMATION**

### Member Check In

**DISCUSSION**

### Executive Director's Report

**INFORMATION**

**Minutes**  
**INTERCITY TRANSIT**  
**CITIZEN ADVISORY COMMITTEE**  
**January 11, 2016**

**CALL TO ORDER**

Chair VanderDoes called the January 11, 2016, meeting of the Citizen Advisory Committee (CAC) to order at 5:30 p.m. at the administrative offices of Intercity Transit.

**Members Present:** Chair Victor VanderDoes; Vice-Chair Jan Burt; Kahlil Sibree; Billie Clark; Sue Pierce; Denise Clark; Leah Bradley; Quinn Johnson; Ursula Euler; Jonah Cummings; Ron Hughes; Joan O'Connell; Ariaah Perez; Carl See; Michael Van Gelder; and Walter Smit.

**Absent:** Mitchell Chong; Julie Hustoft; Charles Richardson; and Lin Zenki.

**Staff Present:** Laura Lowe; Ann Freeman-Manzanares; and Nancy Trail.

**APPROVAL OF AGENDA**

It was M/S/A by VAN GELDER and EULER to approve the agenda.

**INTRODUCTIONS**

VanderDoes introduced Authority member, BUD BLAKE.

VanderDoes introduced new Citizen Advisory Committee members RON HUGHES; JOAN O'CONNELL; WALTER SMIT; AND JONAH CUMMINGS. Each provided a brief self-introduction and identified what they bring to the committee.

**MEETING ATTENDANCE**

- A. January 20, 2016, Work Session - Denise Clark
- B. February 3, 2016, Regular Meeting - Julie Hustoft
- C. February 17, 2016, Work Session - Leah Bradley

**APPROVAL OF MINUTES**

It was M/S/A by VAN GELDER and CLARK, D. to approve the minutes of the November 16, 2015 meeting.

**CONSUMER ISSUES**

- *Cummings* - using the bus to get to work on the weekends and buses running earlier/later on the weekends.

**NEW BUSINESS**

## **Intercity Transit Citizen Advisory Committee**

**January 11, 2016**

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### **A. LOCAL CLIMATE CHANGE/CLEAN ENERGY SURVEY RESULTS – (Tom Crawford)**

Crawford identified himself as a member of the Thurston Climate Action team. In 2008 he and other community activists determined they could make a difference in our communities in issues surrounding climate change. The group incorporated in 2009, and wrote a grant proposal for funds through WSU. The team has collaborated with the EDC to obtain funding for energy efficiency work in 500-600 homes. The result is bringing down greenhouse gas emissions associated with less energy use. Their efforts include helping local jurisdictions with zoning electric vehicle charging stations; collaborating in hosting educational events; and greenhouse gas inventory where climate changing greenhouse gases are coming from. The team thinks collaboratively about the kinds of things that would make most sense to bring down greenhouse gas emissions.

*See arrived.*

Crawford explained the team conducted a community survey in June that was scientifically based, and found broad support for local renewable energy along with the willingness to pay for those efforts. They are currently working with Thurston thrives.

Crawford shared some background on understanding where climate change, global warming and greenhouse gases are coming from in our communities. The leading causes are on-road vehicles and the built environment. He indicated the 'built environment' consists of the light and heat we use in our homes and office buildings. Working with TRPC they set targets and recommendations for specific actions addressing those issues. There is an Intergovernmental panel on climate change that provides global figures on where we are and what we need do about it. The trend doesn't seem to be going up, but is leveling out.

Crawford indicated there are significant benefits for the doing the work. People can save money on transportation and energy and new jobs can be created in our communities. For example, if people get in the habit of riding bikes and riding the bus there are real health benefits associated with that the healthier the community will be. The team wanted to find out what can be done to bring down greenhouse gas emissions in the community. Since Thurston Energy had lost a significant amount of funding the EDC took them under their wing, but they still don't have staff to get around in the community. The team believed if they could expand the energy efficiency to rental units that would make an impact. He indicated promoting solar installations; building out electric vehicle infrastructure; expanding commute trip reduction; farmers transportation cooperation; incentives for efficient vehicles; getting people using less gas; and transportation management are all promising areas for work. As an example he used the Hawks Prairie areas need for transit and that trying to find some creative solutions to provide service. Community education and engagement will be very important with how climate change relates to daily lives and how to make improvements in doing so.

*Bradley arrived.*

Crawford stated the survey work was funded by Thurston County and LOTT; and included partnerships among faculty at St. Martin's; SPSCC; and TESC. The team pulled community agencies together to test some draft questions and get their thoughts on what would work. They hired students from some of the colleges to make the calls.

## **Intercity Transit Citizen Advisory Committee**

**January 11, 2016**

**Page 3 of 10**

Crawford provided the categories including community and environment; climate change; and renewable energy. Participants were asked a series of questions regarding actions they might support. They were asked if they considered energy efficiency in the purchase of their current home, and if it might be a consideration in their next home. Participants were asked to provide demographics on age; gender; income; education etc. to understand the differences in responses.

Crawford reported for quality of community life 23% responded excellent; and 58% responded good. Respondents indicated the top community concerns were traffic; population growth; homelessness; and growth management. The top environmental issue was water quality. The responses to Climate Change include 85% believe people affect the climate; 79% believe climate action is important; and 77% believe inaction will lead to serious local problems.

Crawford indicated most responses to Clean Energy motivations to take action on renewable energy and energy conservation were overwhelmingly positive. The top responses were improved health; protecting future generations; creating jobs; and saving money. People are beginning to think of this in broad terms. The top actions on Clean Energy to promote renewable energy and conservation were home energy; walking; biking; clean energy business; and making sure they are offered county wide. Transit was also an important category.

Crawford reviewed a map breaking down the responses around what programs participants wanted to see by zip code. Improving local transit options was strongest in 98506 and 98513. Promoting walking and biking was strongest in 98506; 98597; and 98513. The size of the pie chart represents the actual population in the zip code. Crawford indicated responses to the attitudes on improving transit options provided no significant differences by age; income level; geography; gender; and education. Politically 95% of liberals agree compared to 70% of conservatives.

Crawford indicated in terms of financing or willingness to pay 69% responded they were willing to pay \$10/year; and 63% were ok with increase in sales; utility; or property tax.

Crawford concluded by relaying residents feel positively about quality of community life; are concerned about climate change and its local effects; favor county-wide coordinated action; including improved transit; would support clean energy programs with money; and are receptive to small tax increases. He indicated there are policy opportunities for the agency and asked that when considering decisions about routing of buses or new routes does to weigh the increase or decrease against the use of renewable energy and energy efficiency; and factor in the impact on greenhouse gas emissions. Crawford stated the team is collaborating with other agencies on putting a county-wide clean energy program together.

*Sibree arrived.*

*Crawford answered questions.*

## **Intercity Transit Citizen Advisory Committee**

**January 11, 2016**

**Page 4 of 10**

*Euler* – inquired about transportation funding districts.

*Freeman-Manzanares* – responded there are several different ways to fund them. Staff has talked to the city of Lacey about this happening in the Hawks Prairie area. They keep coming back saying they want Intercity Transit to provide the service. The agency would like to but funding is an issue. Staff will have more conversations about the situation.

*Euler* – indicated she was involved in the formation of Tumwater's.

*Freeman-Manzanares* – there are transportation benefit areas established by jurisdictions. We have seen the formation of two locally. Tumwater's is sale tax based. The City of Olympia is a charge on vehicle tabs. Districts can also be formed by groups of business or an individual business to provide their own transportation.

*VanderDoes* – asked if any responses included water volume as an issue – a lot of the world is having trouble just having water.

*Crawford* – stated some of the water quality responses were water shortage; drought; pollution, runoff; and groundwater.

*Clark, D.* – asked if the group surveyed around 400 people.

*Crawford* - responded yes.

*Blake* – added out of 260,000.

*Johnson* – asked if there was any correlation of location to sea level rise.

*Crawford* – responded they looked at zip codes in south county and north county and didn't see very much difference which surprised them.

*Smith* – inquired if there was any correlation between people who weren't willing to pay or did not think it was an issue at all and where they got their information about climate change.

*Crawford* – indicated they asked people to provide specific sources, but it was difficult to sort that out, since people could use different terms for the same source. They did not do a correlation on what they were willing to pay.

*See* – asked if there have been similar efforts in other counties.

*Crawford* – indicated he was not aware of any but wouldn't be surprised if there was.

*Freeman-Manzanares* – transportation is a player when talking about water and run off. We could focus on tying that together in a way that is more meaningful to the community.

## **Intercity Transit Citizen Advisory Committee**

**January 11, 2016**

**Page 5 of 10**

*Blake* – asked if they have had an opportunity to go out and do a second survey to validate these numbers.

*Crawford* – indicated as they get closer to narrowing down what the program will look like and when they have more specifics to offer people they might want to go out for another survey.

*Blake* – asked if the survey is available online so people can see the questions.

*Crawford* – responded it is located at [www.thrustonclimateaction.org](http://www.thrustonclimateaction.org) under resources. It includes the report, questionnaire and methodology with cross-tabs.

*Perez* – asked if the survey was given to anyone under 18.

*Crawford* – indicated they only surveyed 18 and over, but maybe in the next survey they might be able to address that age group.

**B. 2016 PROCUREMENT PLAN** (*Laura Lowe*) Lowe introduced herself as the procurement manager and indicated she would provide an overview of what her department would be working in 2016. She said a lot of things are already being tackled in the first quarter. When using public money we look at awarding through a competitive process. Her department assists in writing procurement and contract documents. They work with other departments to schedule all the projects so they work for the agency. Procurement works with all departments and on varying projects including uniforms; security services; janitors; landscaping; cameras; printed transit guides; software licenses; legal services; lobbyist in WA DC; website maintenance and many others. The work includes bidding; renewing; and managing.

Lowe indicated in terms of vehicles for staff use, procurement will purchase an electric vehicle and station wagon for staff use. Procurement staff is also doing a large vanpool replacement project including 33 vans. The agency uses a lot of federal money to buy vans. Staff is looking at Dial-A-Lift vehicle replacement and also a truck for the facilities folks who maintain bus stops.

Lowe relayed information on the Transit Signal Prioritization project and that staff is working with local jurisdictions within the county on 2 corridors. The technology will hold a signal when a bus gets close if no EMS vehicle is near. The Authority recently approved the equipment order.

Lowe explained the agency typically focuses on bus stop enhancements every year. This year we are looking at approximately 40 stops. They are currently in design phase. Staff has hired an engineering firm and will put the project out to bid for construction soon. Staff is also looking at two different camera projects.

Lowe discussed the customer survey project for vanpool and Dial-A-Lift, and also a market segmentation study. There is a community conversations project moving forward soon that was grant funded to hold a conversation that will identify what people want us to look like in the future and what they are willing to fund. Staff is hoping the CAC will assist with this

## **Intercity Transit Citizen Advisory Committee**

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process along with chambers of commerce; EDC; schools; etc. so the agency gets a broad sweep of information.

Lowe indicated staff is in the process of implementing a new phone system. They are also working on installation of new hot water heater; HVAC; and interior painting at the Amtrak station; engineering of new HVAC and interior and exterior painting at Pattison; and installation of new HVAC at OTC. The agency will be buying more solar lights to go in the bus shelters. In maintenance staff is overseeing a project that will cover one of the pits and turn it into a lift. This will provide maintenance another bay to work on buses.

Staff is working on two large projects – one at the OTC to construct a second building to house administrative staff which will have conference rooms, and provide space for Greyhound. Currently staff is working on utility relocation. The agency will hire a very skilled project manager to work with entities and get permits going. The other large project is installation of the new underground storage tanks at Pattison. Recently staff completed a development agreement with the City of Olympia which was approved in December. Shortly thereafter staff went back in with a conditional use permit in late December. Staff is hoping to put it out for bid in May and hopefully have it done before the weather turns. There will be six new tanks, a new fuel canopy, and a lot of parking for buses and vanpools.

*Lowe* answered questions.

*Burt* – asked if the six new tanks are replacing the existing tanks or if it is an increase in volume.

*Freeman-Manzanares* – indicated it is an increase.

*Lowe* – added the old tanks will be decommissioned.

*VanderDoes* – asked if staff has to bid the decommissioning.

*Lowe* – responded yes. It will be bid competitively.

*Freeman-Manzanares* – If the project is \$10k or more, it is formally advertised as a bid, proposal and/or qualifications based. Anything over \$25k goes to the authority for approval.

*VanderDoes* – asked if the \$10k or \$25k is pursuant to a WAC.

*Freeman-Manzanares* – indicated it's an Intercity Transit policy.

*Lowe* – added when the economy is soft the agency gets good bids. The state amount is \$10k.

*Perez* – asked if Greyhound helping.

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*Freeman-Manzanares* – indicated they have been interested in joining us at the OTC for a long time. The conversations started 21 years ago, and we didn't have enough grant funds to include them.

*Perez* – asked if the agency is hiring out the painting project or asking for volunteers.

*Lowe* – responded the agency hires professionals with insurance, etc.

*See* – asked if the passage of new transportation funding at the federal level changes the grant process?

*Freeman-Manzanares* – indicated FTA hasn't released available grant processes as yet but she is hopeful it will provide more opportunities for the agency. The agency worked with the Bus Coalition and APTA to get those discretionary dollars back and it looks like it replaces about 60% of what was lost.

*Freeman-Manzanares* – added that one of the reasons we include telephone numbers on the agenda items is so members can contact staff. She indicated members can always contact her or Nancy.

*Blake* – asked if there is audit oversight function.

*Freeman-Manzanares* – the agency has some contracts administered by the procurement division and then there are some that are farmed out to other departments. Procurement is the go-to group when there are contractual issues. In some instances accounting provides that function. Then there is always have a secondary check because FTA comes in and audits our projects with a fine tooth comb and the state also audits the agency on an annual basis.

*Blake* – added this ensures taxpayer funds are used appropriately.

*Lowe* – added all procurement staff came from state agencies and have a lot of experience.

- C. DISCOUNTED BUS PASS PROGRAM** (*Ann Freeman-Manzanares*) *Freeman-Manzanares* stated this is the fifth year of the Discounted Bus Program. The Authority established the program at a time when agencies serving low income populations were taking budget hits. By offering bus passes, it provides transportation at half the cost. Initially the Authority set the level at \$200k meaning the agency would forego up to \$100k in revenue. There is the potential that some of those passes would not be purchased if not for the program. This is the first year that the applications exceeded the initial limit. The agency has received \$260k in applications to date, so staff brought it back to the Authority to request an increase in funding for the program. The Authority raised the amount to \$300k. At this point there is \$39k left in the program. Although there is a due date, it is a rolling application. The attachment provides a list of recipients. If there is an organization you would like us to add please let us know. The goal is to use the \$300k to serve the community and make sure their transportation needs are met.



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*Freeman-Manzanares* answered questions.

*Perez* – asked how staff knows they’re reaching all the people.

*Freeman-Manzanares* – indicated we don’t know that we are reaching all of the organizations that could use it. Staff has an ever growing list and distributes through the United Way as well. If the CAC knows of an organization that might qualify and might be interested, send them our way. Or let us know and we’ll reach out to them.

*Perez* – asked if she could connect groups in need at her school.

*Freeman-Manzanares* – responded that Olympia High School has participated for a number of years. Staff has a connection with the PIO for the North Thurston school district and tries to get the information out through that avenue as well as others. Please let us know if there is someone you think we should get in touch with.

### CONSUMER ISSUES

- *Cummings* – indicated it might be worthwhile for the agency to look at the ridership data for the 48 and 49, early morning, during the weekend, to see whether or not it would make sense to offer an earlier bus. If it doesn’t look like it would be cost effective, then finding a way to reach out to businesses, etc.
- *VanderDoes* – indicated he recently saw a strobe light attached to a bus stop which caught him off guard.

*Freeman-Manzanares* – responded during this time of year the number of people that are missed at stops increases. It is one of the things we work very hard to figure out. We don’t want to miss a single passenger but it’s very dark and frequently, people are wearing dark clothes. The OTC gives out the blinking lights, and recommend riders use lights on their phones to make sure operators can see them. The agency has installed solar lighting at many stops, but they don’t work everywhere due to canopies of trees. It is too expensive to electrify them. The Hawks Prairie Park & Ride is experimenting with LED motion lights now.

*Smit* – indicated he caught the bus at 7:00 am this morning wearing dark colors, but always carries a small flash light and hasn’t had a bus miss him. Smit asked if any of the solar panels had been stolen.

*Freeman-Manzanares* – responded she didn’t believe any had ever been stolen but she would check into it and report back.

### REPORTS

- *Clark, B.* – provided the report from the November 18, 2015, Work Session indicating there were some very informative presentations.

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- *Euler* – provided the report from the December 2, 2015, Regular Meeting indicated the ITA was very supportive of the Discounted Bus Pass program and trying to get as much participation as possible. Sales tax was doing really well and the trend has continued, reminded us that there is a Legislative Conference in DC.

*Freeman-Manzanares* – indicated APTA hosts a variety of conferences for transit agencies including the Legislative conference. Normally elected officials from the Authority attend so they can talk with the elected's in DC. This year they will talk about the new federal transportation legislation, and what our agencies needs are. Last year attendees met with Senator Moran from Kansas. Typically they only meet with their local agencies, but he is a natural advocate of our agency because the DAL vehicles are built in Kansas. Last year staff needed to do a lot of educating because of the MAP-21 funding issues and the impact possibly requiring a reduction of service. APTA also hosts a board member seminar and they talk about governance, and policy development. And, they have a CEO conference in February that she attends where they talk about transit management, legislation and regulations, etc. One of the things that we've done in the past is made spots available for CAC members to attend the WSDOT transportation.

- *Burt* – provided the report from the January 6, 2016, Regular Meeting and recommended CAC members go to the website to review the action items beforehand. The ITA approved three purchases including 33 new vanpool vans; 3 high performance servers; and towing services. New staff members were introduced and one promotion; and we got the bike shop invitation. Burt noted that she submitted the build a bike program as a benefactor of a fundraising program at the agency she works for.
- *Freeman-Manzanares* – provided the General Manager's report and invited everyone to the new Bike Shop Open House, noting the location encourages people to volunteer. February is the time the Authority receives new members as they bid farewell to Joe Baker from the city of Yelm. There may be some shake up at the County Commissioner's as well. At the last board meeting Freeman-Manzanares spoke to the authority about hiring a state advocate. Last year a piece of legislation made it through the House for additional local options. It did not get into the combined bill. The agency needs some additional assistance, but it will be a small contract because it is a short session. She relayed information on a recent meeting with Senator Patty Murray's aid held here at Intercity Transit. Freeman-Manzanares invited some General Manager's from agencies to the south and the Olympic Peninsula. Schedules are difficult for these individuals and if Senator Murray wants to visit they need to know the agency can get a meeting organized on the fly. Staff executed a Development Agreement with the City of Olympia which is actually part of the larger project at the Pattison Street facility. The agency has worked on another grant for the Bikes in PE project. Tumwater school district had the highest rate of accidents and this teaches teachers to teach safe bike riding. Staff is trying to coordinate with NTSD and OSD to expand the program. Travel Training is going off in an expanded way working to assist a Korean group who meets at the Lacey Community Center. Staff is venturing out into non English speaking audiences. She shared an email she received lauding the praises of the Jingle Bus; and indicated sales tax for November came in at 9.27%.

*Pierce* – inquired about the status of new website.

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*Freeman-Manzanares*- indicated it wasn't functioning as we had hoped so it was taken down for more work and the old website put backup. Staff hopes to have the new site online in the next few weeks.

*Clark, B.* - relayed that recently she was waiting for fixed route at the OTC and a ramp wasn't working so they sent the Jingle Bus to her home.

*Bradley* - remarked she has recently been busing to Everett and it has made her really appreciate our drivers.

**NEXT MEETING: February 8, 2016, a week earlier in observance of the Presidents' Day holiday.**

### **ADJOURNMENT**

**It was M/S/A by PIERCE and EULER to adjourn the meeting at 7:25 pm.**

Prepared by Nancy Trail

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**INTERCITY TRANSIT AUTHORITY**  
**AGENDA ITEM NO. 7-A**  
**MEETING DATE: February 3, 2016**

**FOR:** Intercity Transit Authority

**FROM:** Emily Bergkamp, Dial-A-Lift Manager  
Kathy Chambers, Senior Associate, Moore and Associates

**SUBJECT:** Dial-A-Lift Customer Satisfaction Survey Results

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1) **The Issue:** Provide the Authority with the results of the 2015 Dial-A-Lift (DAL) Customer Satisfaction Survey.

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2) **Recommended Action:** For Information and discussion.

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3) **Policy Analysis:** The Authority budgeted for, and authorized the commission of, a DAL customer satisfaction survey. The results of that survey will be presented to the Authority.

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4) **Background:** On August 19, 2015, the Authority authorized a contract with Moore and Associates, an independent research firm, to conduct a Customer Satisfaction Survey of current riders and non-riders of its DAL Americans with Disabilities Act paratransit service. The surveys were conducted utilizing a telephone methodology, with complementary online data collection, during October and November 2015. Two survey instruments were utilized; one targeted current riders and another targeted eligible riders who have not recently used the service. Such data can help guide service evaluation and identify potential areas of improvement, and serve as a comparison to previous survey results. Intercity Transit strives to conduct DAL customer surveys every three to five years. The most recent DAL customer survey was conducted in 2011.

Kathy Chambers, Senior Associate from Moore and Associates will provide a summary report of the data collected, share recommendations and answer questions. DAL Manager, Emily Bergkamp will also be present to answer questions.

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5) **Alternatives:** N/A.

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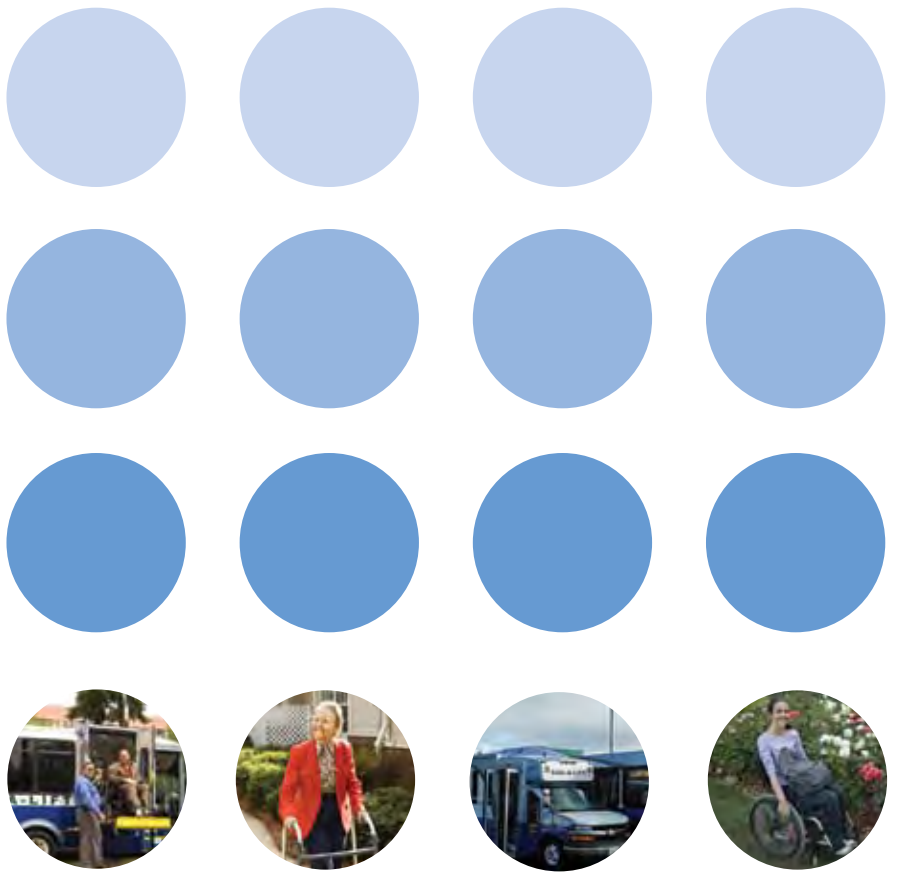
6) **Budget Notes:** Intercity Transit entered into a contract with Moore & Associates to conduct the DAL customer satisfaction survey in an amount not-to-exceed \$21,000. The contract was completed within the budgeted amount, which is less than authorized in the budget.

---

7) **Goal Reference:** **Goal #1:** *“Assess the transportation needs of our community throughout the Public Transportation Benefit Area.”* **Goal #2:** *“Provide outstanding customer service.”* **Goal #3:** *“Maintain a safe and secure operating system.”* **Goal #4:** *“Provide responsive transportation options within financial limitations.”* **Goal #6:** *“Encourage use of services.”*

---

8) **References:** 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys.



# INTERCITY TRANSIT

2015 DIAL-A-LIFT CURRENT RIDER AND NON-RIDER  
SATISFACTION SURVEYS

FINAL REPORT

JANUARY 2016





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**2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys**

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# Executive Summary

In fall 2015, Intercity Transit commissioned a survey of current riders and non-riders of its Dial-A-Lift (DAL) Americans with Disabilities Act paratransit service. Intercity Transit sought to collect feedback both from clients who had used the service within the past year as well as those who are eligible to use the service but who had not recently done so. Such data can help guide service evaluation and identify potential areas of improvement.

The objectives for the DAL survey included:

- Gathering data on overall satisfaction of riders,
- Identifying service improvements desired by current riders,
- Creating a profile of DAL clients and how they are using the service,
- Identifying barriers to service usage among non-riders, and
- Updating 2011 baseline performance data as a basis for future-year comparisons.

The surveys were conducted utilizing a telephone methodology, with complementary online data collection, during October and November 2015. Two survey instruments were utilized; one targeted current riders and another targeted eligible riders who have not recently used the service. Survey contacts came from a database provided by Intercity Transit.

### Current Rider Survey

The current rider component resulted in the collection of 435 valid surveys, exceeding the sample target of 400.

Through analysis of the simple frequencies arising from the collected data, we compiled a profile of the “typical” rider. Based on survey responses, the profile DAL rider:

- Is female,
- Self-identifies as Caucasian,
- Reports a total annual household income of \$14,999 or less,
- Pays her fare in cash,
- Holds a Reduced Fare permit,
- Has not driven a car in the last month, and
- Reports being “very satisfied” overall with the DAL service.

### Non-Rider Survey

The non-rider survey resulted in a sampling of 116 respondents. Through analysis of the data, it was determined several of the surveyed individuals originally determined to be inactive were actually current users of the DAL service and therefore invalid for the purposes of the non-rider survey. Removing these individuals reduced the survey sample to 84.



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

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By analyzing the simple frequencies arising from the collected data, we compiled a profile of the “typical” non-rider. Based on survey response, the profile non-rider:

- Is female,
- Self-identifies as Caucasian,
- Has a total annual household income of \$24,999 or less,
- Is satisfied with DAL interactions to this point,
- Has not recently utilized regular public transit, and
- Has other transportation options that contribute to the lack of DAL use.

### Recommendations

The results of the 2015 surveys were very positive, with riders reporting very high satisfaction levels with nearly all attributes of the reservation, pick-up, and ride experience. Even a majority of non-riders gave positive ratings. Still, some survey respondents identified concerns influencing their overall experience, and in some cases their willingness to ride.

The concerns included:

- Eleven percent of non-riders reported difficulty completing their registration for the service.
- Many riders and non-riders indicated a desire to schedule trips outside of the five-day scheduling window, or to have an improved chance of successfully scheduling a last-minute trip.
- Nearly 10 percent of respondents to the non-rider survey expressed interest in the service yet resided outside the service area—in some cases, a mile or less outside the service area.

Section 2 of this report includes summary and analysis of responses from current riders, while Section 3 includes summary and analysis of responses from non-riders. Where notable, the analysis includes comparisons between 2015 and 2011 survey data.

The survey instruments and data frequencies are included in the appendices of this report.



# Current Rider Survey

In fall 2015, Intercity Transit commissioned a survey of riders of its Dial-A-Lift (DAL) Americans with Disabilities Act paratransit service. The survey was designed to collect feedback from clients who are currently using the service, which would help the operator evaluate its service and identify potential areas of improvement.

Objectives for the DAL current rider survey included:

- Gathering data on overall satisfaction of riders,
- Identifying desired service improvements,
- Creating a profile of DAL clients and how they are using the service, and
- Updating 2011 baseline performance data as a basis for future-year comparisons.

The surveys were conducted utilizing a telephone methodology, with complementary online data collection, during October and November 2015. The pool of survey respondents for the rider survey came from a list of telephone numbers provided by Intercity Transit.

### Survey Development and Administration

The DAL Customer Satisfaction Survey was developed in conjunction with Intercity Transit staff, utilizing the survey instrument from the previous DAL customer survey conducted in 2011. Utilizing the same instrument supports baseline comparisons between the responses from the two survey periods.

Moore & Associates uploaded the survey instrument to Survey Monkey to support complementary online data collection. To promote the survey, a pre-survey postcard was distributed to current and inactive DAL patrons using a database provided by Intercity Transit. The postcard had two objectives: to communicate the legitimacy of the DAL phone survey within the target audience and to encourage participation.

### Data Collection

Moore & Associates developed a sample target of 400 respondents. All phone calls were conducted by trained bilingual surveyors and monitored by supervisory staff. Phone numbers called were strictly limited to those provided by Intercity Transit. Households where contact was not completed were called a maximum of three times, after which the phone number was retired. When initiating a phone call, surveyors introduced themselves on behalf of Intercity Transit and asked permission to conduct the survey. Upon receiving consent, a question was asked to clarify if the contactee was the person listed in the database or a relative or personal care attendant answering on behalf of the DAL registrant/user.

Trained surveyors read each question along with potential responses. Surveyors were responsible for completing the survey with the respondent, including documenting any additional information the respondents may provide. If a respondent was unclear of a question or responses, the surveyor would assist by providing clarification while not “leading” the response.

# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

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When necessary, surveys were conducted through a TTY or through Washington Relay Service, the free service provided by the Washington State Office of the Deaf and Hard of Hearing (ODHH), to enable individuals who are hearing impaired to participate in the survey.

Data collection resulted in 435 valid samples for the current rider survey, exceeding the sample target. Of these 435 surveys, 1.8 percent were completed online.

The survey instrument and data frequencies are included in the appendices of this report.

### Data Processing

All current rider survey data was entered into Microsoft Excel using trained personnel. Supervisors reviewed data entry work on a daily basis while also conducting spot-checks throughout each day.

Data cleaning was undertaken by trained personnel following completion of data entry. This process resolved variations in data formatting that resulted in identical responses being sorted as different (i.e., “blind” and “BLIND” were cleaned to form one response). The cleaned data was then imported into a Statistical Package for the Social Sciences (SPSS) database for further analysis.

The SPSS database allowed the consultant to compile simple frequencies as well as perform cross-tabulations within relevant datasets. Data cross-tabulations allow comparisons between survey responses that can provide additional insight into customer profiles, travel patterns, perceptions of service, and demographics.

### Survey Findings

#### *“Typical” Respondent Profile*

By analyzing the simple frequencies arising from the collected data, we developed a profile of the “typical” DAL rider. The profile rider:

- Is female,
- Self-identifies as Caucasian,
- Reports a total annual household income of \$14,999 or less,
- Pays DAL fare in cash,
- Holds a Reduced Fare permit,
- Has not driven a car in the last month, and
- Reports being “very satisfied” overall with the DAL service.



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

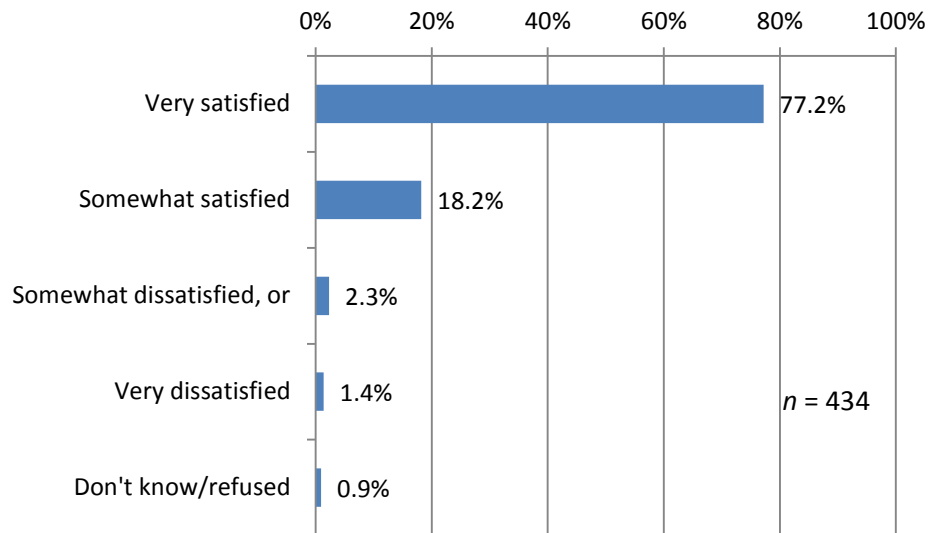
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*Question: Thinking about your experience with Dial-A-Lift overall, which of the following comes closest to describing your rating of the services provided to you?*

Slightly more than 77 percent of current DAL users indicated they were “very satisfied” with DAL services. An additional 18.2 percent reported being “somewhat satisfied” with DAL services. Less than five percent reported dissatisfaction.

Exhibit 2.1 Satisfaction



### *Comparison: 2015 vs. 2011 satisfaction levels*

The 77.2 percent of riders who indicated being “very satisfied” is an increase of more than 7 percent from the 70 percent noted during the 2011 survey period. The 95.4 percent of respondents who indicated being either “very satisfied” or “somewhat satisfied” is similar to the 96 percent who indicated the same satisfaction levels in 2011.



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

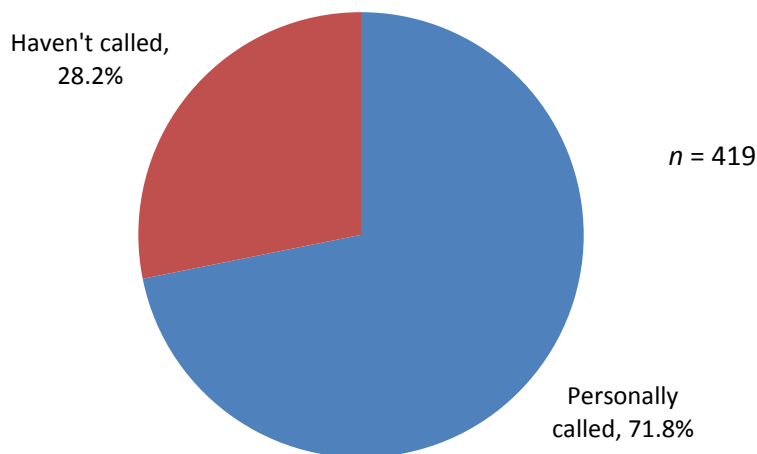
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**Question: Have you personally called Dial-A-Lift to make a reservation for any rides in the past month?**

Nearly 72 percent of respondents reported personally making a ride reservation during the month prior to survey contact.

Exhibit 2.2 Personal Reservation Calls



### Satisfaction with Ride Reservation Experience

**Question: I'd now like you to think about your experience reserving a ride through Dial-A-Lift over the past month. Please only consider your interaction on the phone with ride schedulers when providing a rating.**

Respondents were asked to rate a series of attributes related to the DAL ride reservation process. Response options included "Excellent," "Good," "Only Fair," or "Poor." These attributes were then assigned ratings based on a four-point scale, with "Excellent" equaling four points, "Good" equaling three points, and so on. A mean rating for each attribute was then calculated.

Overall, respondents rated each attribute between "Excellent" and "Good." The highest-rated reservation attribute was "courtesy of ride schedulers," which received a mean rating of 3.68. The lowest-rated attribute was "length of hold time before speaking to a ride scheduler," which received a mean rating of 3.21.

Exhibit 2.3 Reservation Experience Ratings

Attribute	Mean Rating
Length of hold-time before speaking to a ride scheduler.	3.21
Courtesy of ride schedulers.	3.68
The hours ride schedulers are available to book your trip.	3.37
The skill of the ride scheduler in working to meet your reservation needs.	3.47

To provide further insight into the various attribute ratings, see Exhibits 2.3.a through 2.3.d.

# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

Exhibit 2.3.a Reservation Satisfaction - Length of Hold Time

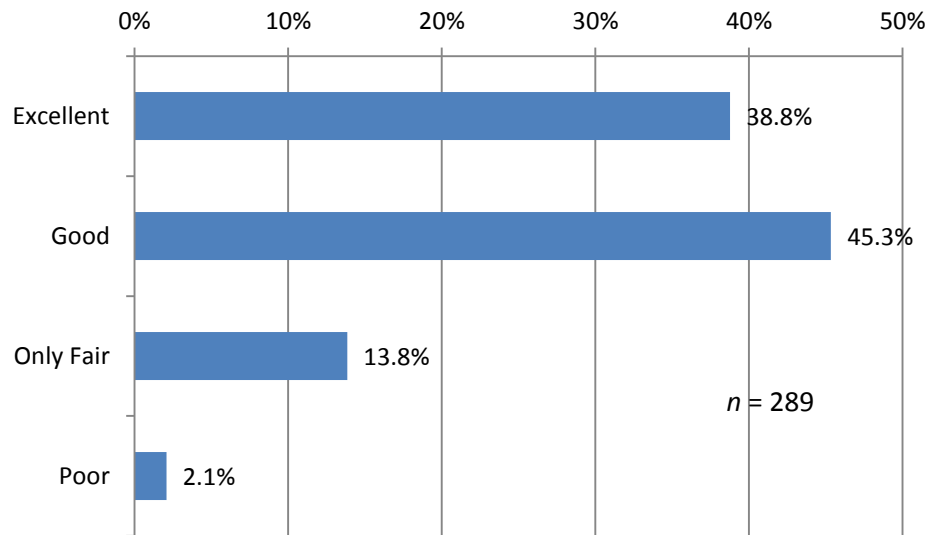
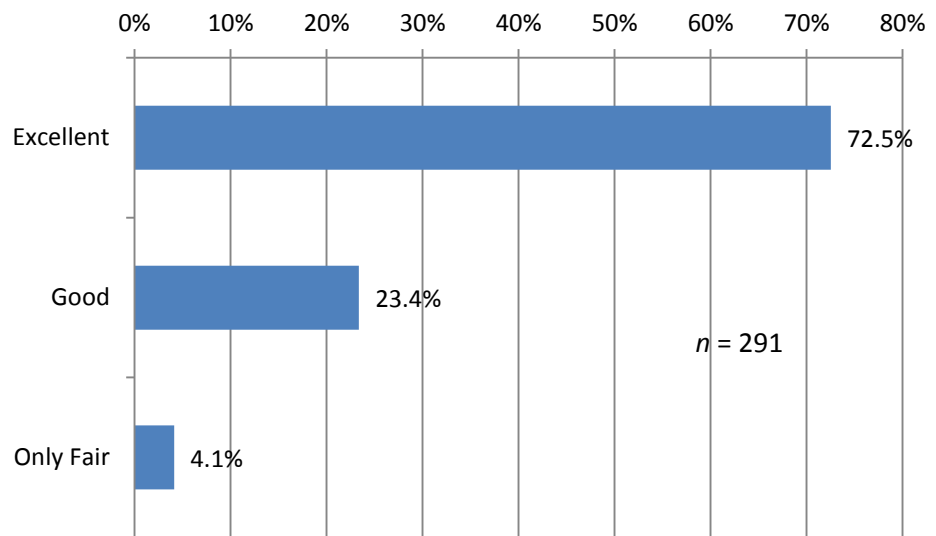


Exhibit 2.3.b Reservation Satisfaction – Courtesy of Ride Schedulers



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

Exhibit 2.3.c Reservation Satisfaction – Hours Schedulers are Available

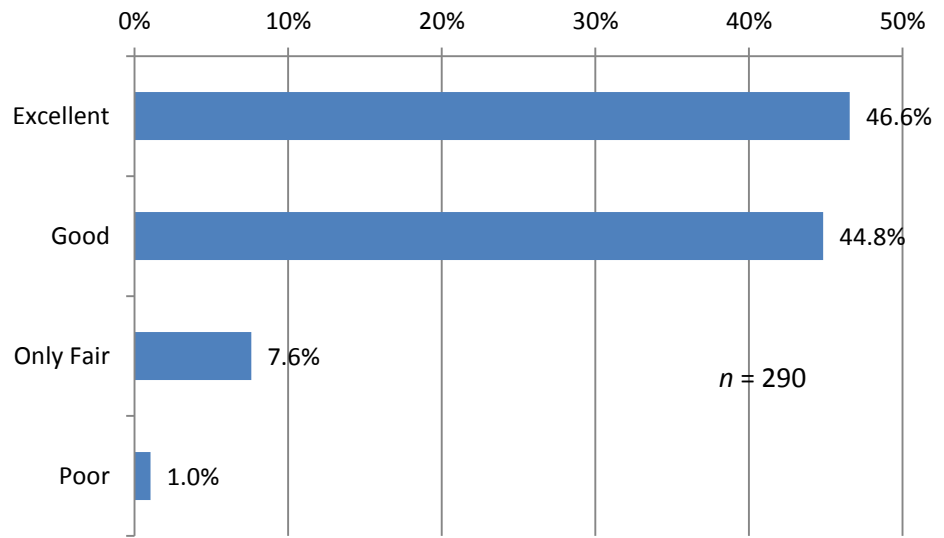
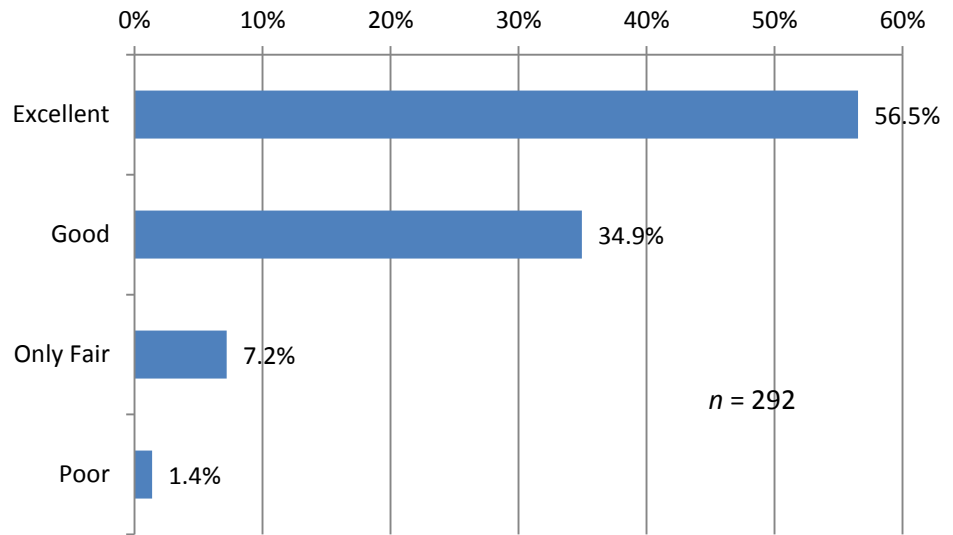


Exhibit 2.3.d Reservation Satisfaction – Skill of Ride Scheduler



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### *Comparison: 2015 attribute ratings vs. 2011 attribute ratings.*

The following chart compares the percentage of respondents who rated each scheduling attribute as “Excellent” or “Good” in 2015 to the corresponding percentage in 2011.

The attribute with the greatest increase in positive rating was “Length of hold-time before speaking to a ride scheduler,” which increased six percentage points from 2011. Only one attribute, “The skill of the ride scheduler in working to meet your reservation needs,” declined in rating; it decreased two percentage points to 91.0 percent.

Exhibit 2.3.e Reservation Experience Ratings

Attribute	2015 Rating	2011 Rating
Length of hold-time before speaking to a ride scheduler.	84%	78%
Courtesy of ride schedulers.	96%	96%
The hours ride schedulers are available to book your trip.	91%	90%
The skill of the ride scheduler in working to meet your reservation needs.	91%	93%



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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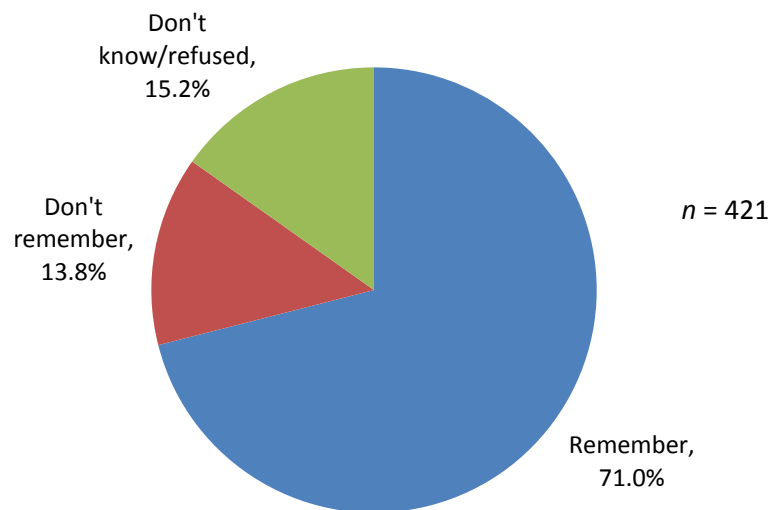
#### Questions about a Specific Scheduled Trip

The next set of questions asked respondents to recall their experience of a specific trip that had been scheduled on a specific date and pickup time. (Note: schedule information was provided by Intercity Transit.) The surveyor’s instructions to the respondent were: “Although you may have also used Dial-A-Lift to travel in the reverse direction on that day, for these next few questions I would like you to think just about the portion of the trip when you traveled from” the specified departure location to the specified destination location at the specified pickup time. Respondents were assured their personal information would not be shared with other parties beyond the DAL rider survey.

#### Question: Do you recall that you were scheduled to take this particular trip?

More than 70 percent indicated they recalled the specified trip provided by Intercity Transit. While 13.8 percent said they did not remember the specified trip, 15.2 percent said they did not know or declined to answer.

Exhibit 2.4 Recall of Specified Trip



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

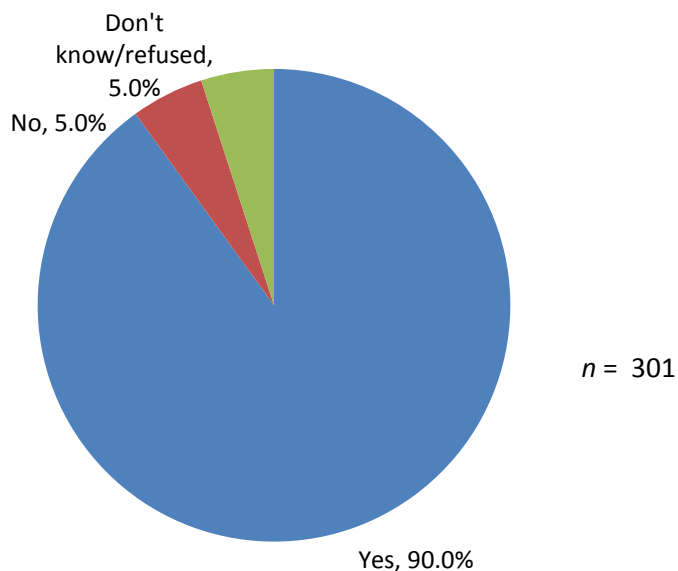
## Intercity Transit

### Final Report

#### Question: Did you actually take this particular trip?

Ninety percent of respondents indicated actually completing the specified trip.

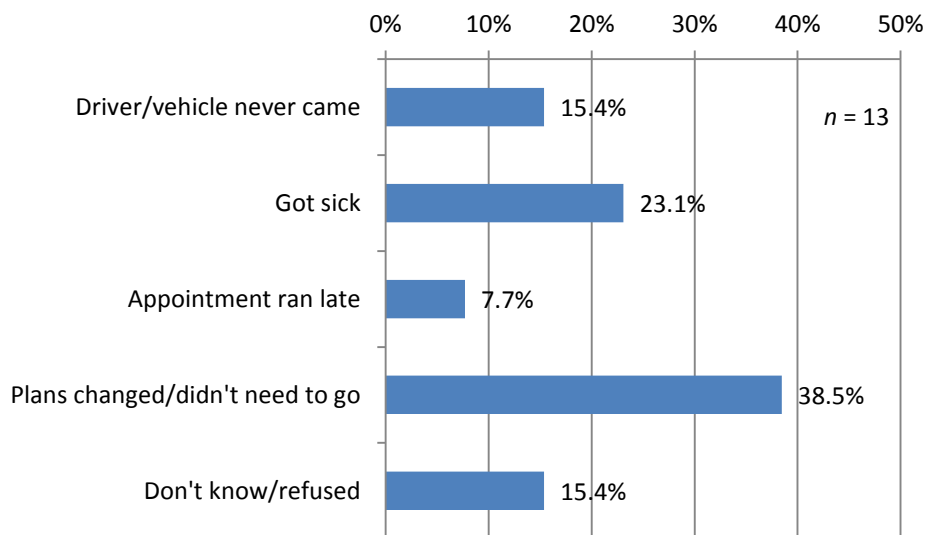
Exhibit 2.5 Execution of Scheduled Trip



#### Question: Can you tell me why you did not take this trip?

The 13 respondents who reported not making the specified trip were asked to indicate a reason why not. "Plans changed" was the most common response, selected by 38.5 percent of respondents. "Got sick" was the second-most common response (23.1 percent). It should be noted that 15.4 percent indicated they did not take the trip because the driver/vehicle never arrived.

Exhibit 2.6 Reason for Aborted Trip



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

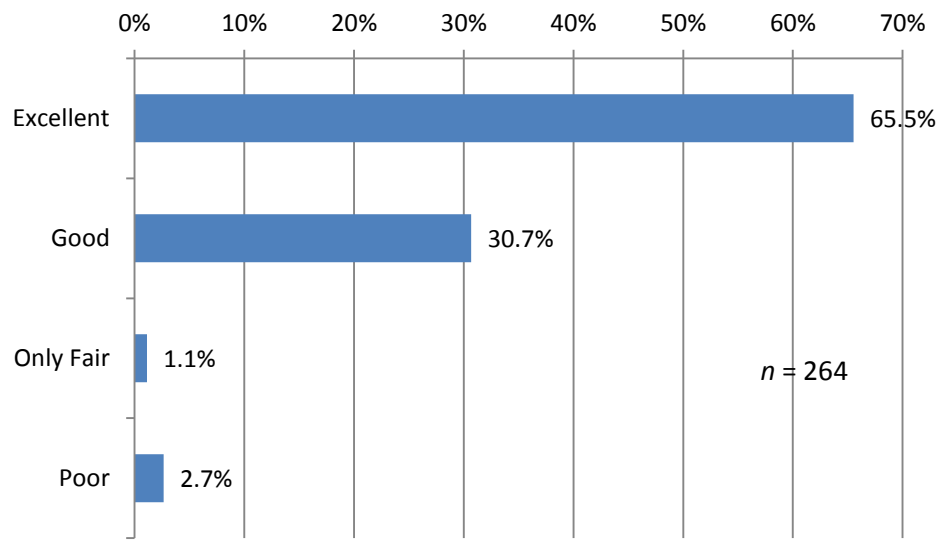
## Intercity Transit

### Final Report

#### Question: Overall, would you say the quality of Dial-A-Lift's service on this trip was...

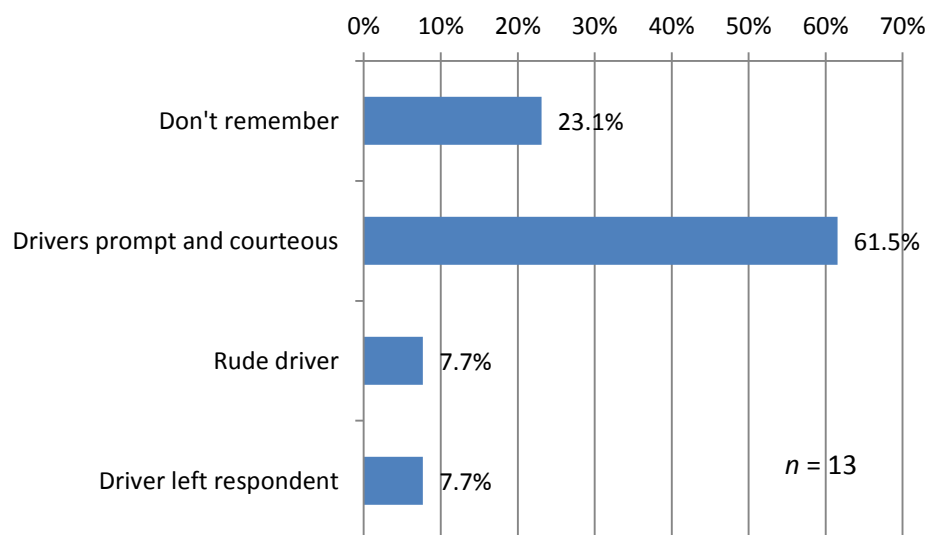
Survey respondents were asked to rate the specified trip as "Excellent," "Good," "Only Fair," or "Poor." Nearly 66 percent rated the surveyed trip as "Excellent," and 30.7 percent rated it as "Good." Less than four percent rated their specified trip as "Only Fair" or "Poor." The 96 percent who provided a positive rating was a slight increase over the 95 percent who did so during the 2011 survey period.

Exhibit 2.7 Rating of Specified Trip



Respondents were asked to elaborate on their responses to the prior question. Nearly 62 percent cited the promptness and courteousness of drivers. One respondent who gave a negative rating cited a rude driver, while another reported being left on a trip. (Note: This alleged incident may not have occurred on the date specified based on the trip information provided by Intercity Transit.)

Exhibit 2.7.a Reason for Rating



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

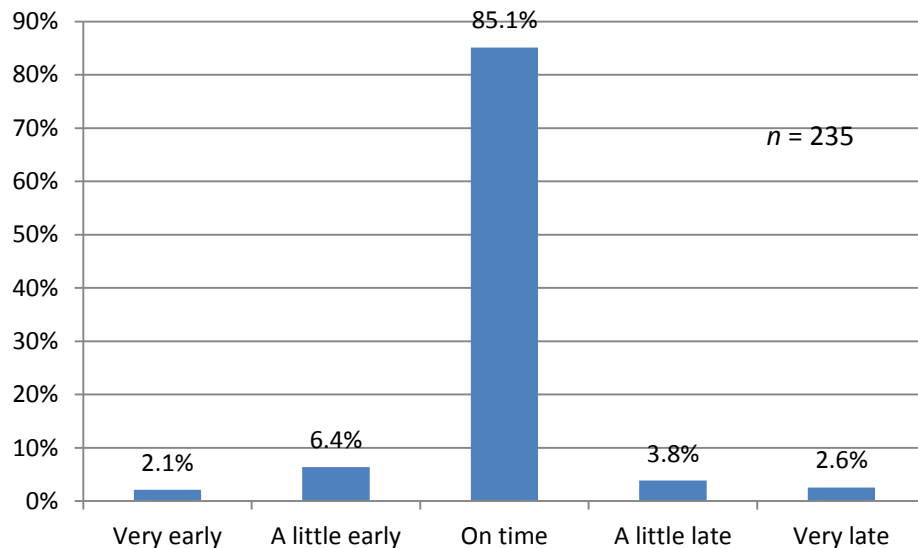
## Intercity Transit

### Final Report

**Question: Did the driver arrive during the pickup window or did he or she arrive before or after the window? If before or after, was the driver a little or very \_\_\_\_\_ (early or late)?**

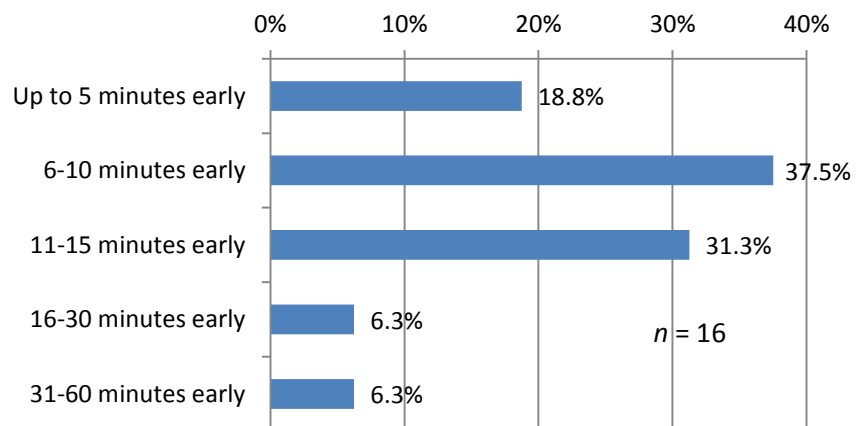
More than 85 percent of respondents reported the DAL driver arrived within the agreed-upon pickup window. Approximately eight percent reported the DAL driver arrived early. Approximately six percent of respondents reported the DAL driver was late.

Exhibit 2.8 Driver Arrival



Drilling down, 2015 respondents who indicated an early arrival were asked to estimate how many minutes before their pickup window the driver arrived. Nearly 38 percent estimated 6-10 minutes early, followed by 31.3 percent who estimated 11-15 minutes. Approximately 13 percent estimated an early arrival of 16 minutes or more.

Exhibit 2.8.a Early Driver Arrival





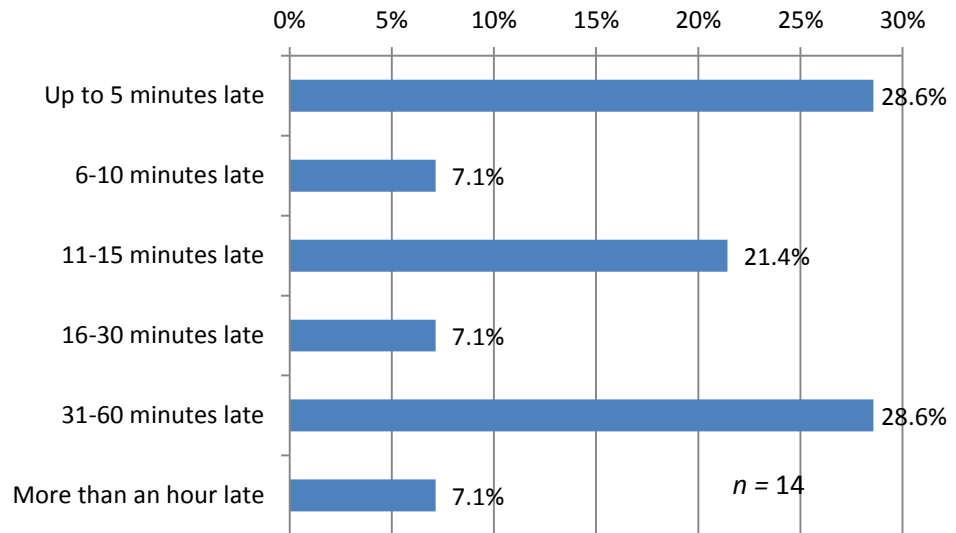
## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

Respondents who indicated a late arrival were asked to estimate how many minutes after their pickup window the driver arrived. Two responses were selected by 28.6 percent of respondents: up to five minutes late and 31-60 minutes late.

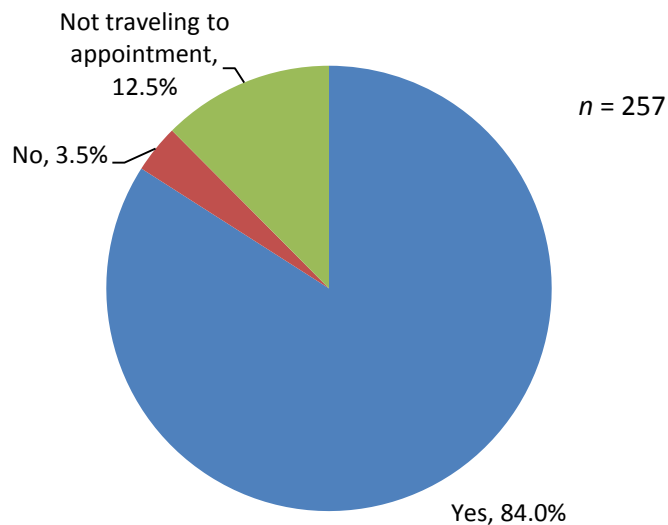
Exhibit 2.8.b Late Driver Arrival



#### **Question: If traveling to an appointment, did you arrive in adequate time at your destination?**

Eighty-four percent of total respondents said they arrived at their destination in adequate time. Approximately 13 percent reported they were not traveling to an appointment where timeliness was a consideration.

Exhibit 2.9 Appointment Punctuality



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

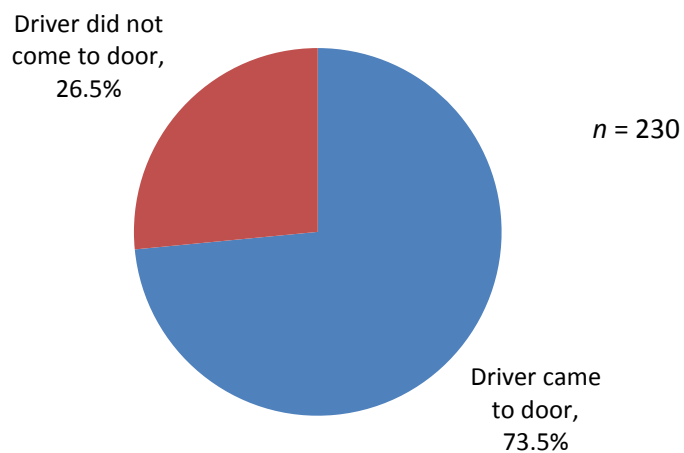
#### Questions about Driver's Aid

The next several questions of the survey regarded the actions of the driver during the surveyed trip.

**Question: Did the driver of this trip get out of the vehicle and announce himself/herself to you at your door?**

Nearly 74 percent of respondents reported the driver exited the DAL vehicle and announced himself or herself at the client's door. This was an increase over the 66 percent who reported the driver announced himself/herself at the door during the 2011 survey period.

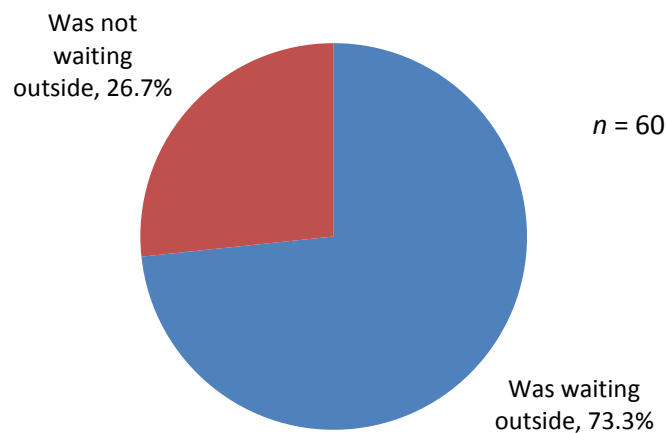
Exhibit 2.10 Driver at Door



**Question: Were you waiting outside or at the curb when the driver arrived?**

Slightly more than 73 percent of survey respondents who indicated the driver did not come to the door in the previous question reported they were waiting outside or at the curb when the DAL driver arrived.

Exhibit 2.11 Waiting Outside



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

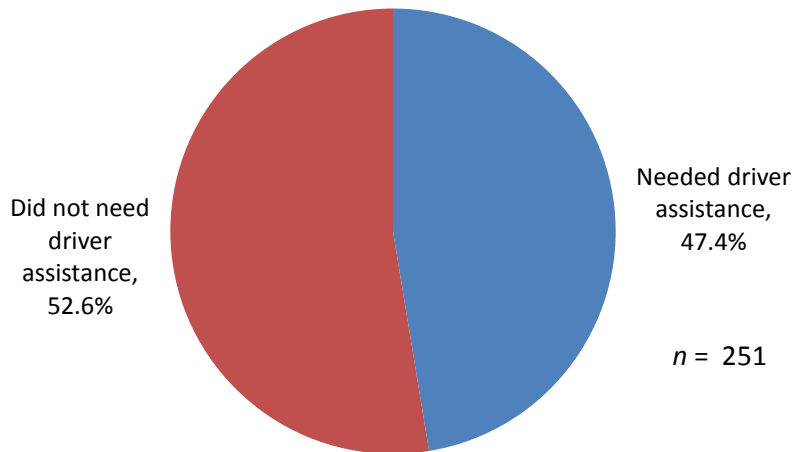
### Final Report

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**Question: Did you need the driver's help in getting to or from the door, or getting in or out of the vehicle?**

Slightly less than half of respondents (47.4 percent) reported needing the DAL driver's help in getting to or from the door or getting in or out of the vehicle.

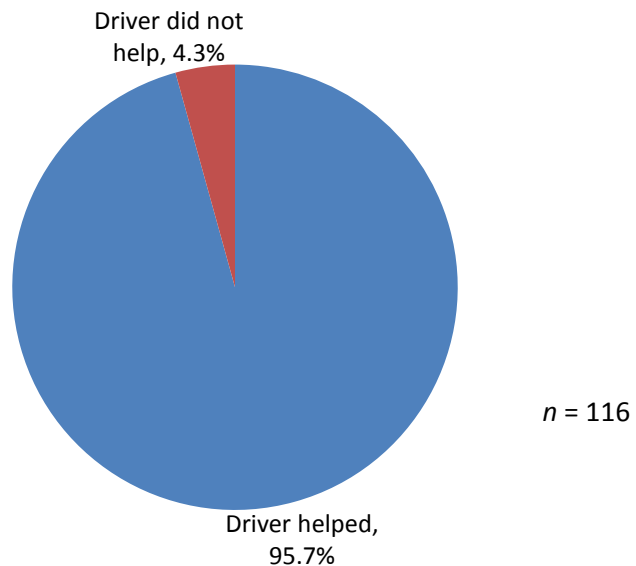
Exhibit 2.12 Needed Driver Assistance



**Question: Did the driver actually help you?**

Nearly 96 percent of respondents who said they needed the DAL driver's assistance indicated receiving that assistance.

Exhibit 2.12.a Received Driver Assistance



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### Question: How would you rate the following attributes?

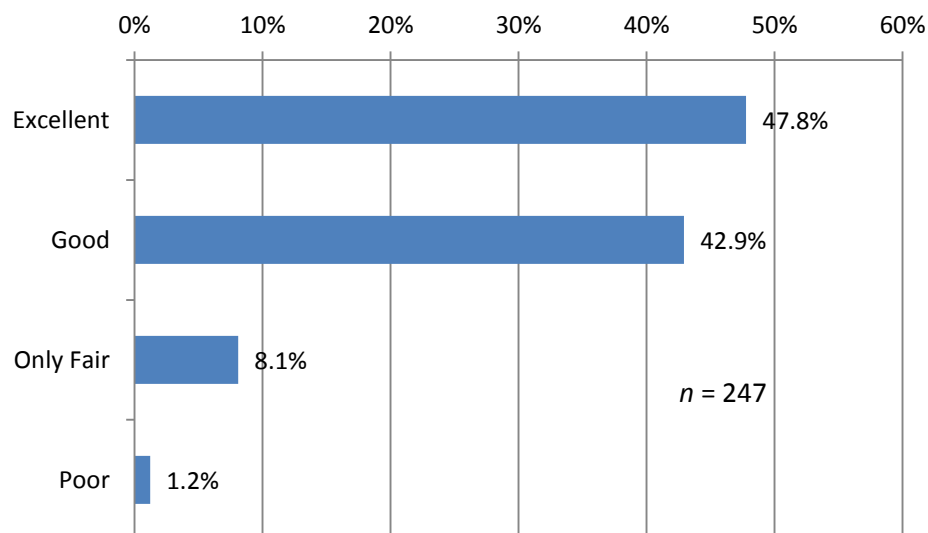
Respondents were asked to rate a series of attributes as “Excellent,” “Good,” “Only Fair,” or “Poor.” These attributes were assigned ratings based on a four-point scale, with “Excellent” equaling four points, “Good” equaling three points, and so on. A mean rating for each attribute was then calculated based on the survey responses. Overall, each attribute received a rating between “Excellent” and “Good.” The highest-rated attribute was “driver courtesy,” which received a 3.76 rating, followed by “The driver's skill and care in tying down your wheelchair or scooter,” which received a 3.72 rating. The lowest-rated attribute was “ride comfort,” which received a 3.37 rating.

Exhibit 2.13 Ride Attribute Ratings

Attribute	Mean rating
Ride comfort	3.37
Overall vehicle condition	3.57
Driver courtesy	3.76
Driver driving skills	3.67
Condition/ease of use of seat belts	3.42
Driver skill/care in tying down wheelchair/scooter	3.72

To provide further insight into the various attribute ratings, see Exhibits 2.12.a through 2.12.f.

Exhibit 2.13.a Ride Satisfaction Ratings – Comfort



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

Exhibit 2.13.b Ride Satisfaction Ratings – Overall Vehicle Condition

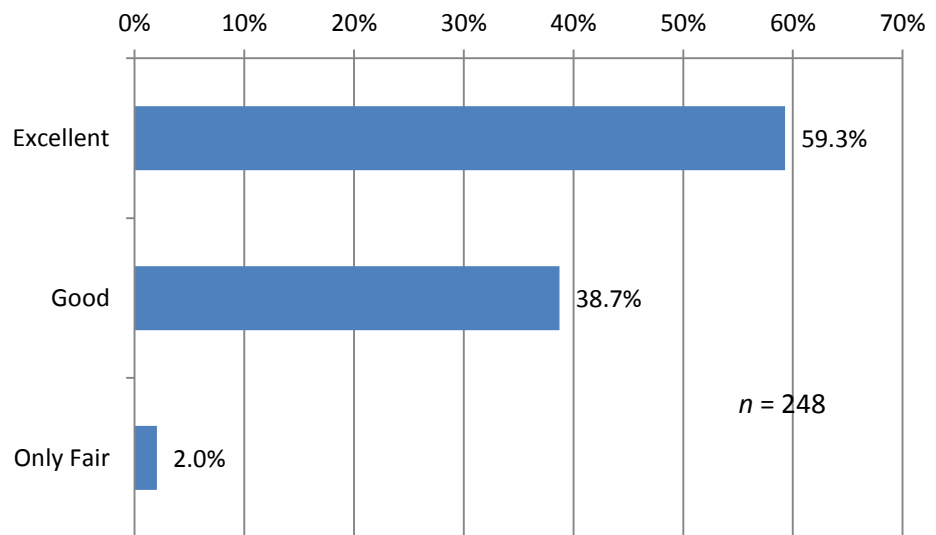
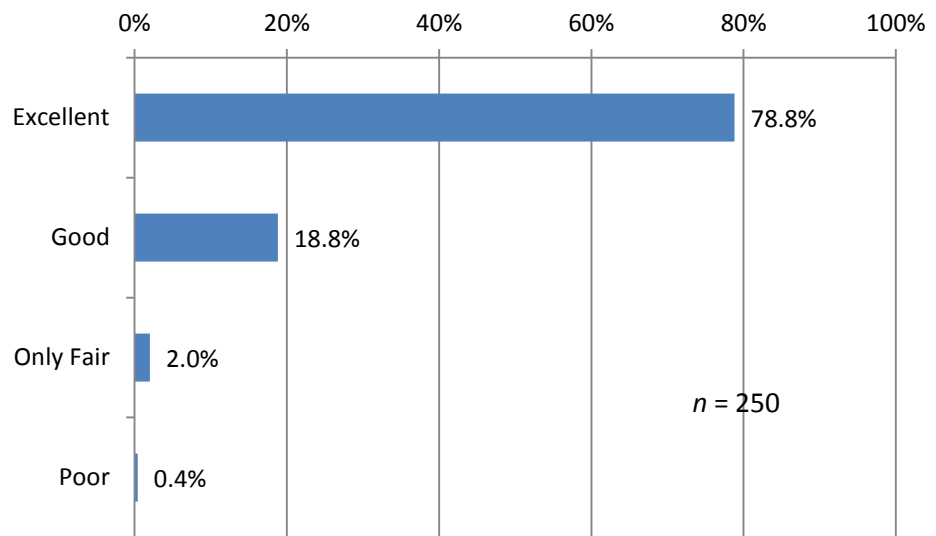


Exhibit 2.13.c Ride Satisfaction Ratings – Driver Courtesy



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

Exhibit 2.13.d Ride Satisfaction Ratings – Driving Skills of the Driver

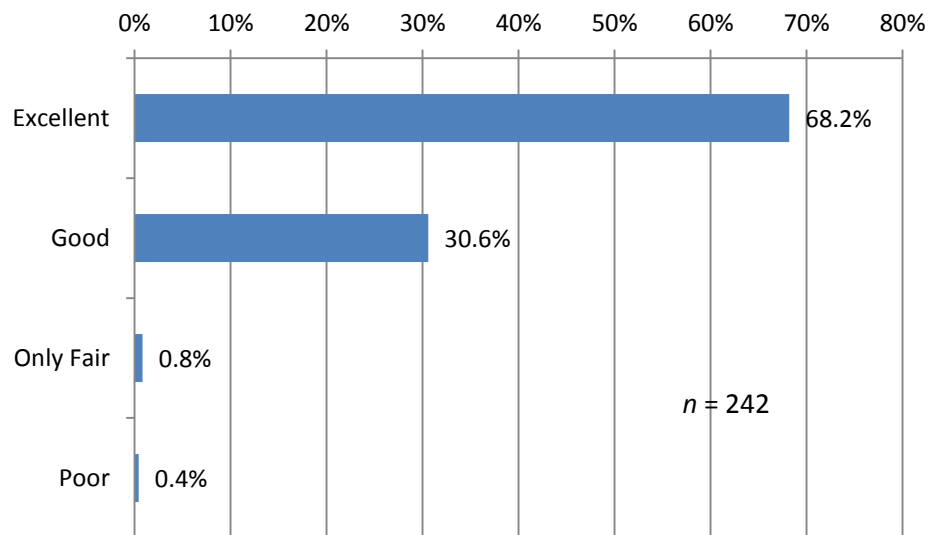
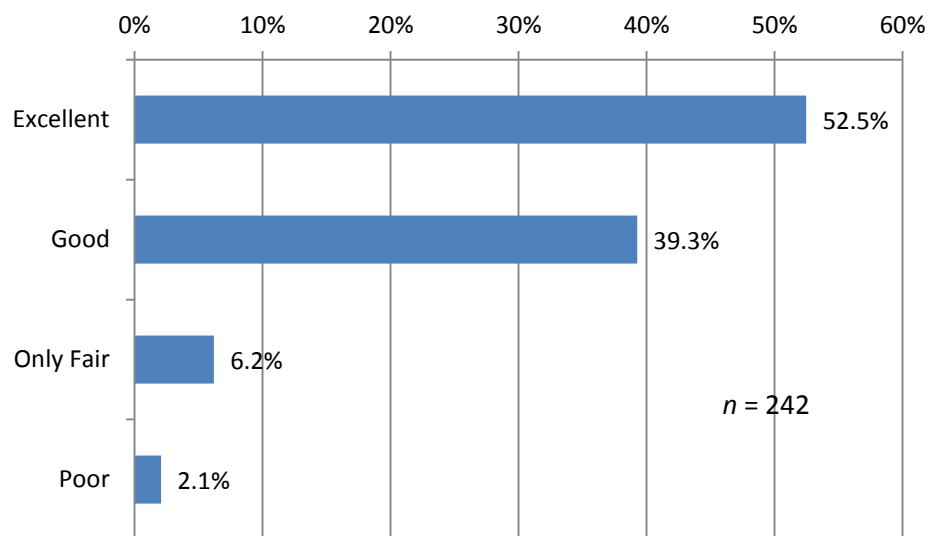


Exhibit 2.13.e Ride Satisfaction Ratings – Condition and Ease of Use of Seat Belts

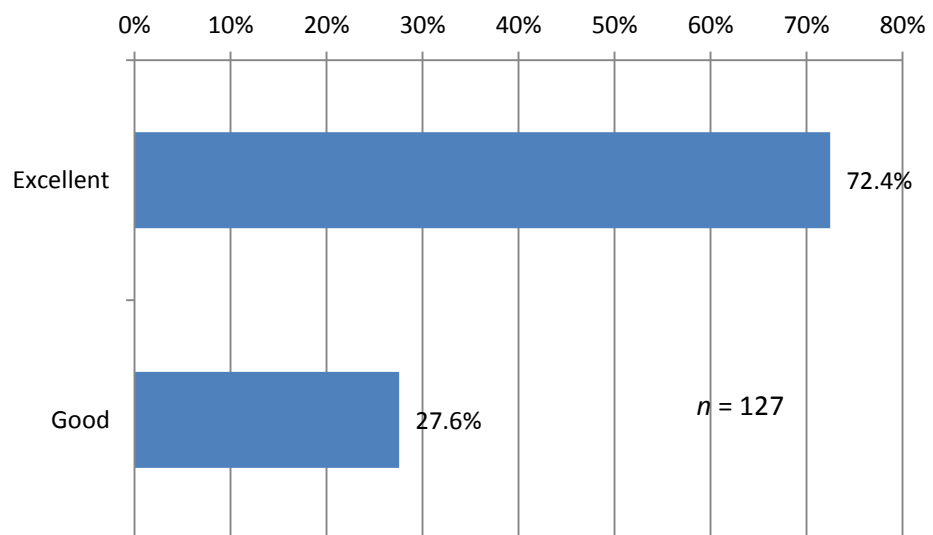


## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

Exhibit 2.13.f Ride Satisfaction Ratings – Driver’s Skill and Care in Tying Down Wheelchair or Scooter



#### Comparison: 2015 vs. 2011 ride attribute ratings

The following chart compares the percentage of respondents who rated each ride attribute as “Excellent” or “Good” in 2015 with those who did so in 2011.

As Exhibit 2.12.g shows, ride attribute ratings were up across the board. All respondents gave positive ratings regarding driver skill in tying down wheelchairs and scooters. The lowest-rated attribute was still “ride comfort,” which was rated favorably by 91 percent of respondents.

Exhibit 2.13.g 2015 vs. 2011 Ride Attribute Ratings

Attribute	2015 Rating	2011 Rating
Ride comfort	91%	88%
Overall vehicle condition	98%	93%
Driver courtesy	98%	95%
Driver driving skills	99%	95%
Condition/ease of use of seat belts	92%	88%
Driver skill/care in tying down wheelchair/scooter	100%	91%

# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

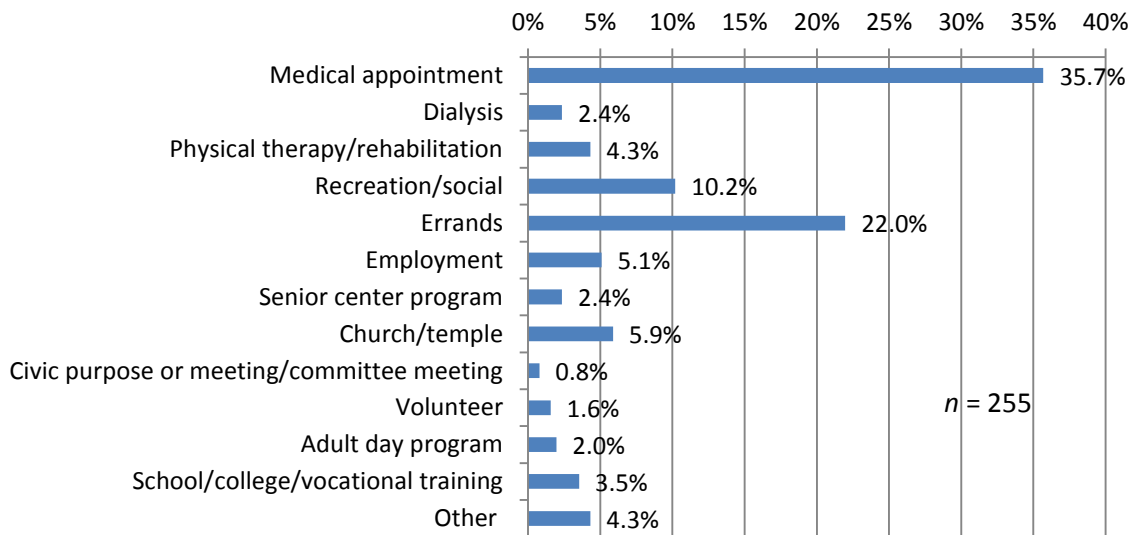
## Intercity Transit

### Final Report

#### Question: What was the purpose of the specified trip?

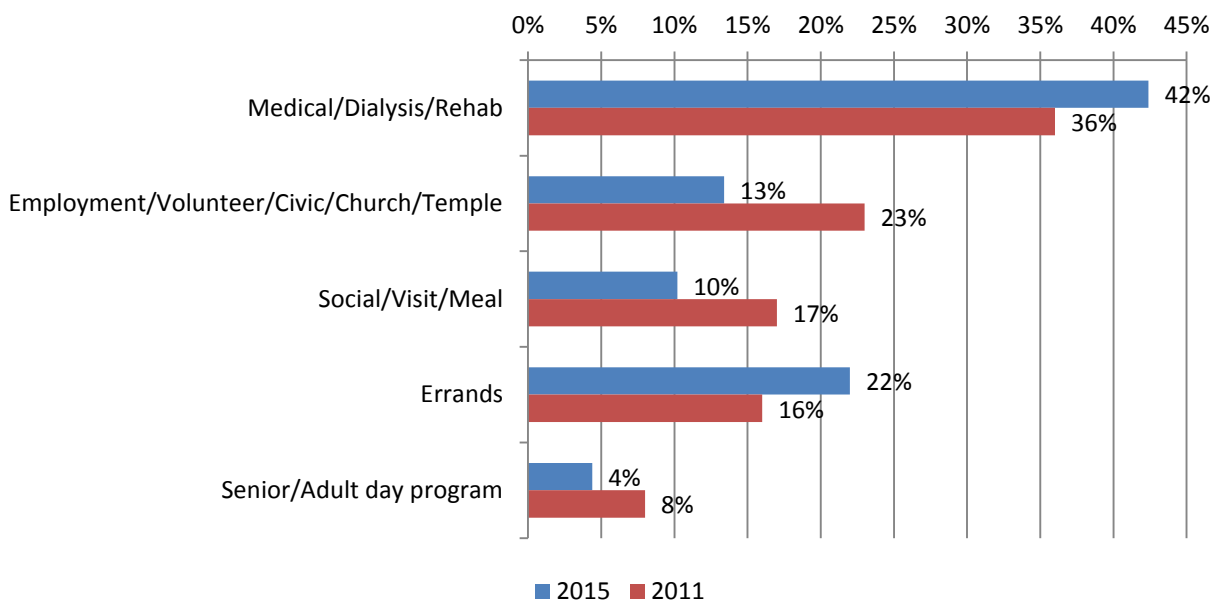
Nearly 36 percent of respondents indicated the surveyed DAL trip was taken for a medical appointment. The second-most common response was errands (e.g., grocery shopping or hair appointments), cited by 22.0 percent.

Exhibit 2.14 Specified Trip Purpose



Compared to 2011 responses, the percentages of respondents traveling for medical appointments or errands increased slightly in 2015, while the percentages of respondents traveling for employment/civic/religious and social activities declined.

Exhibit 2.14.a 2015 vs. 2011 Specified Trip Purpose





## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

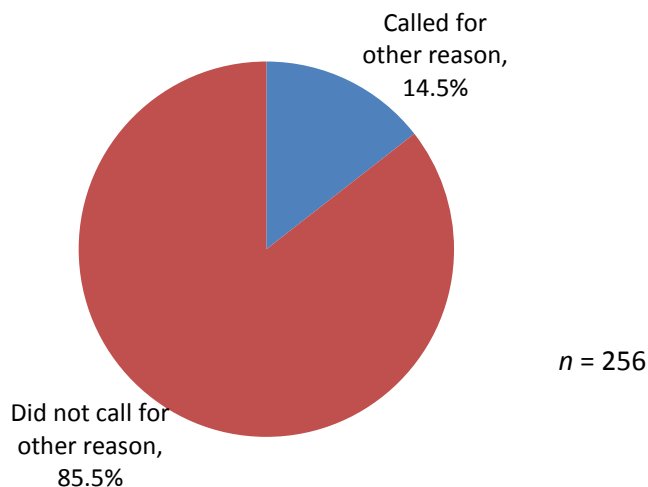
### Intercity Transit

#### Final Report

**Question: In the past month, did you call Dial-A-Lift for information or customer service (e.g., for any reason other than to make a reservation)?**

Only 14.5 percent of respondents reported calling DAL Customer Service for any reason other than to make a reservation.

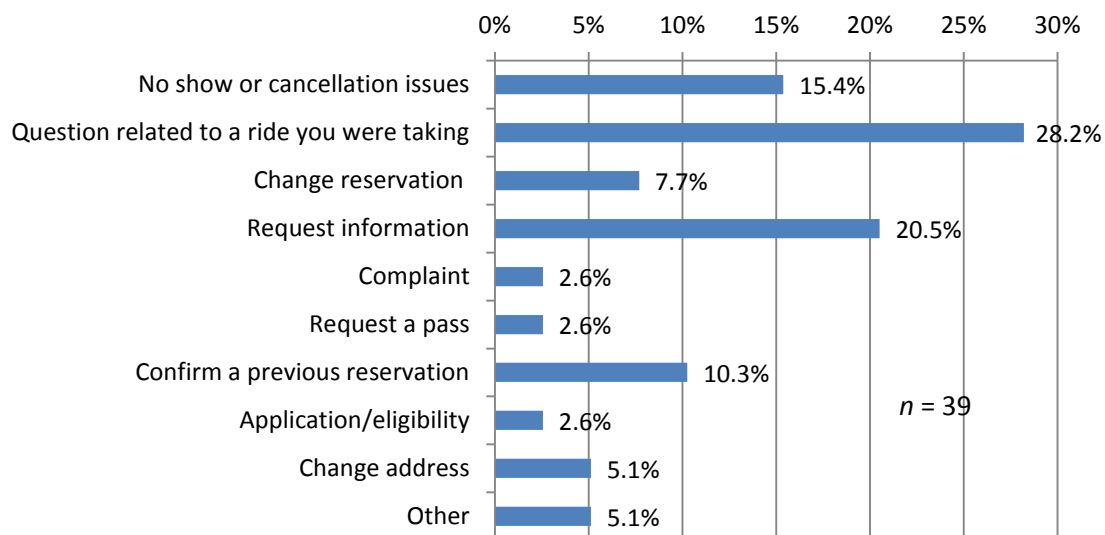
Exhibit 2.15 Occurrence of Non-Reservation Calls



**Question: What was the main purpose of your most recent call?**

The most commonly cited purpose of recent calls to DAL Customer Service was a question related to a scheduled trip (a clarifying example provided to customers by surveyors was “where’s my ride?”), cited by 28.2 percent of respondents. Requests for information were the second-most common call purpose (20.5 percent).

Exhibit 2.16 Purpose of Most Recent Call



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

#### *Question: How would you rate the following attributes of your most recent non-reservation Customer Service call?*

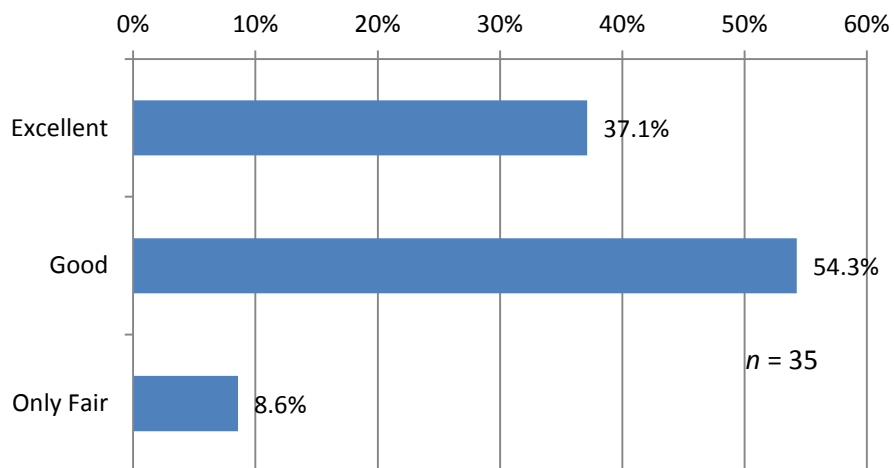
Respondents were asked to rate a series of attributes related to their most recent non-reservation Customer Service call as “Excellent,” “Good,” “Only Fair,” or “Poor.” These attributes were assigned ratings based on a four-point scale, with “Excellent” equaling four points, “Good” equaling three points, and so on. A mean rating for each attribute was then calculated based on the survey responses. Overall, each attribute received a rating between “Excellent” and “Good.” The highest-rated attribute was “Skill of the customer service agent in handling your question or dealing with your problem,” which received a 3.74 mean rating. The lowest-rated attribute was “Length of time on hold before speaking to a customer service agent,” which received a 3.29 rating.

Exhibit 2.17 Rating of Most Recent Call

Attribute	Mean rating
Length of time on hold before speaking to a customer service agent.	3.29
The length of time it took to finish the entire call.	3.73
The courtesy of the customer service agent.	3.69
The skill of the customer service agent in handling your question or dealing with your problem.	3.74

To provide further insight into the various attribute ratings, see Exhibits 2.17.a through 2.17.d.

Exhibit 2.17.a Rating of Most Recent Call – Length of Hold Time



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

Exhibit 2.17.b Rating of Most Recent Call – Length of Time to Finish Entire Call

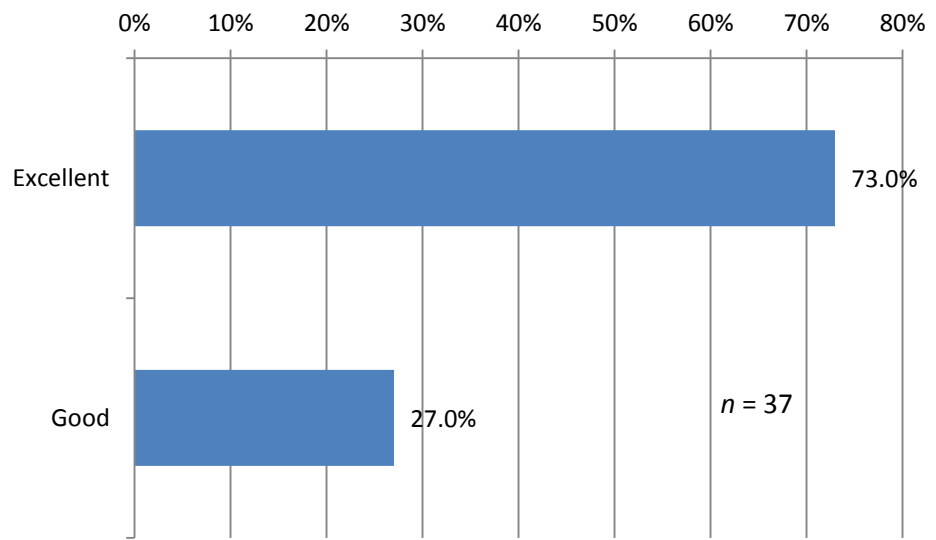
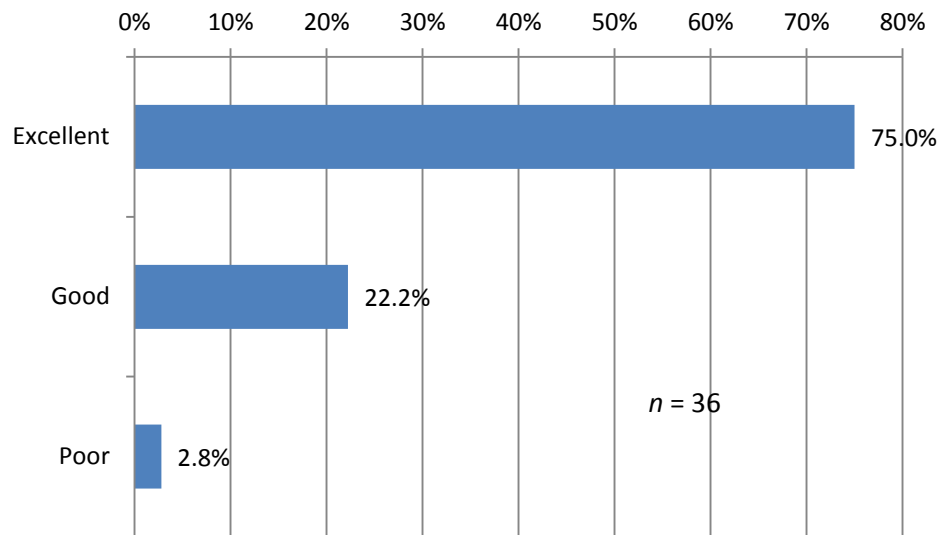


Exhibit 2.17.c Rating of Most Recent Call – Customer Service Agent Courtesy

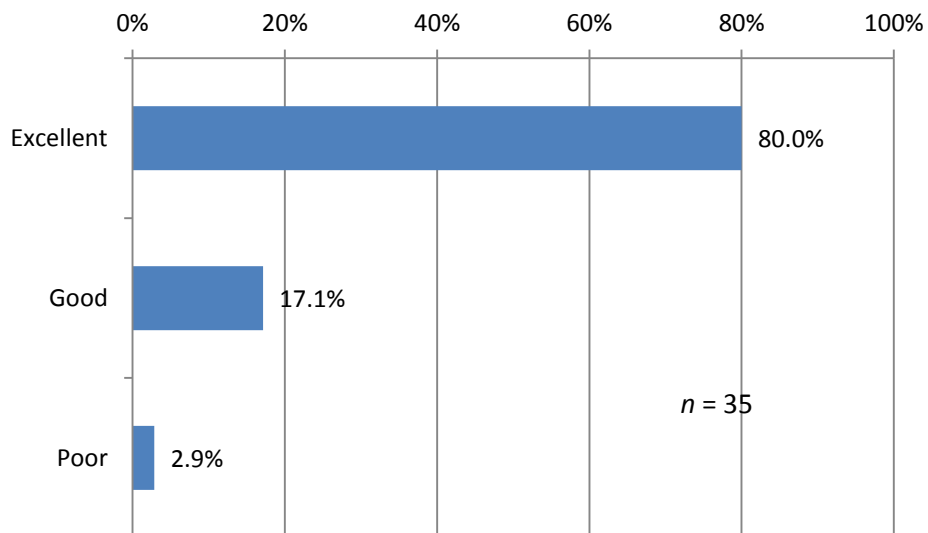


# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

Exhibit 2.17.d Rating of Most Recent Call – Customer Service Agent Skill



#### Comparison: 2015 vs. 2011 ride attribute ratings

The following chart compares the percentage of respondents who rated each non-reservation call attribute as “Excellent” or “Good” in 2015 with those who did so in 2011.

As the chart indicates, positive ratings for each attribute increased across the board. The rating for length of hold time increased 18 percentage points, while the rating for length to finish the entire call increased 12 percentage points. Another attribute with a large rating increase was customer service agent skill, which increased ten percentage points.

Exhibit 2.17.e 2015 vs. 2011 Rating of Most Recent Call

Attribute	2015 rating	2011 rating
Length of time on hold before speaking to a customer service agent.	91%	73%
The length of time it took to finish the entire call.	100%	88%
The courtesy of the customer service agent.	97%	96%
The skill of the customer service agent in handling your question or dealing with your problem.	97%	87%



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

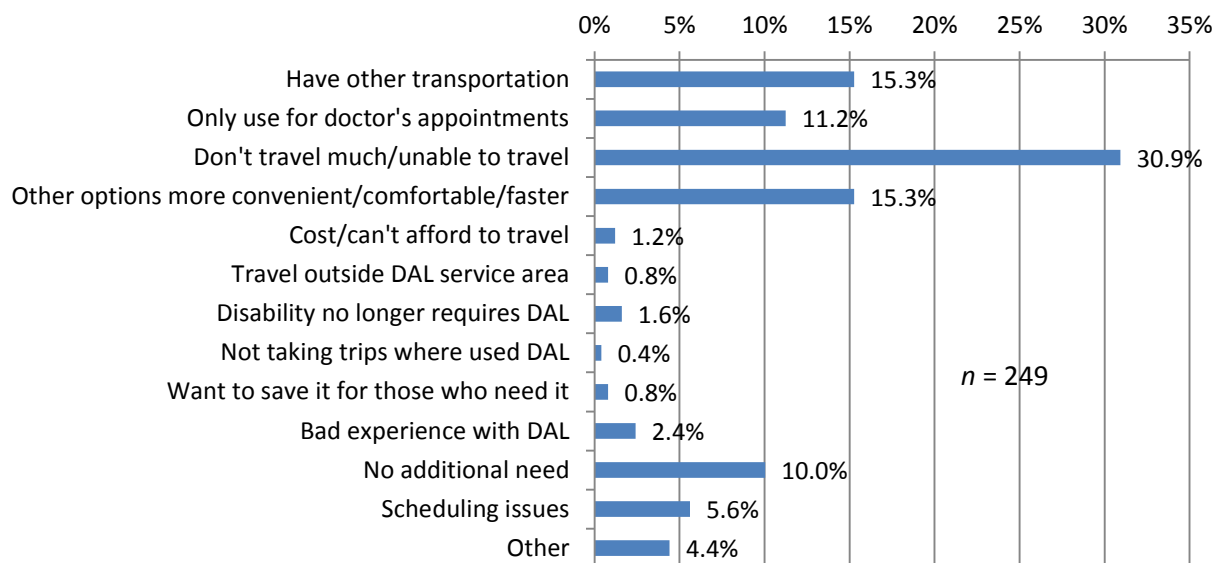
## Intercity Transit

### Final Report

#### Question: What is the main reason you don't ride Dial-A-Lift more often? Any other reasons?

Nearly 31 percent of respondents reported they do not utilize DAL more frequently because they do not travel much or are unable to travel. Another 30.6 percent have other transportation or prefer other transportation options perceived as more convenient or more comfortable. One recurring barrier identified by respondents was scheduling issues: 5.6 percent reported they did not like the one-to-five-days scheduling window, or could not get a trip at their preferred time, or had other scheduling conflicts that prevented them from riding. Additional "other" responses included moving from a previous location or using it only for specific activities.

Exhibit 2.18 Barriers to Increased DAL Usage



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

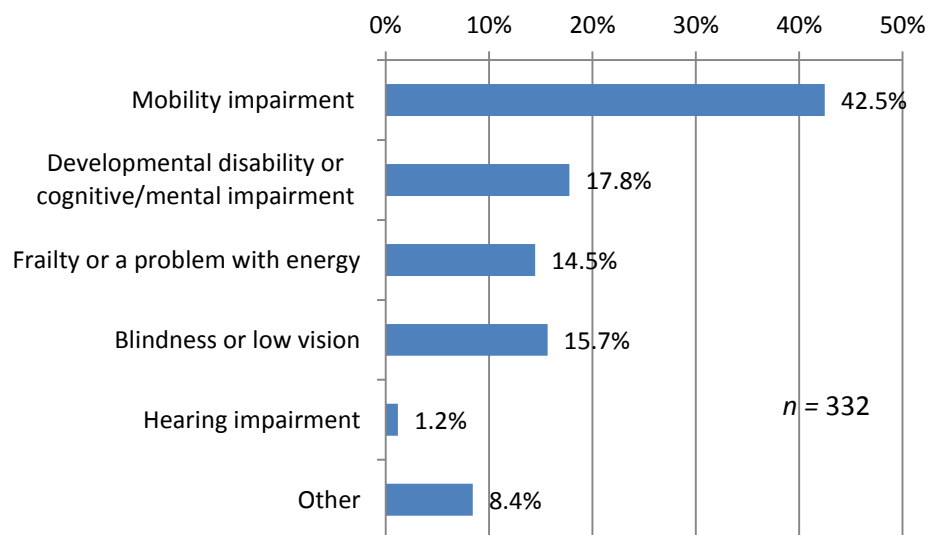
### Final Report

### Demographic Questions

*Question: Can you please tell me what disability or disabling conditions are the main reasons you use Dial-A-Lift rather than the regular bus?*

Nearly 43 percent of respondents stated a mobility impairment is a primary reason for DAL usage rather than the regular bus. Developmental disabilities or cognitive and mental impairments were the second-most common response, selected by 17.8 percent of respondents. Of the “other” responses, approximately one-third had issues with balance or did not want to walk but did not necessarily have a diagnosed mobility impairment. While it is possible these “other” respondents could have a mobility impairment, it is also possible their limitations are due to other factors such as time of day or weather conditions.

Exhibit 2.19 Disabilities or Disabling Conditions



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

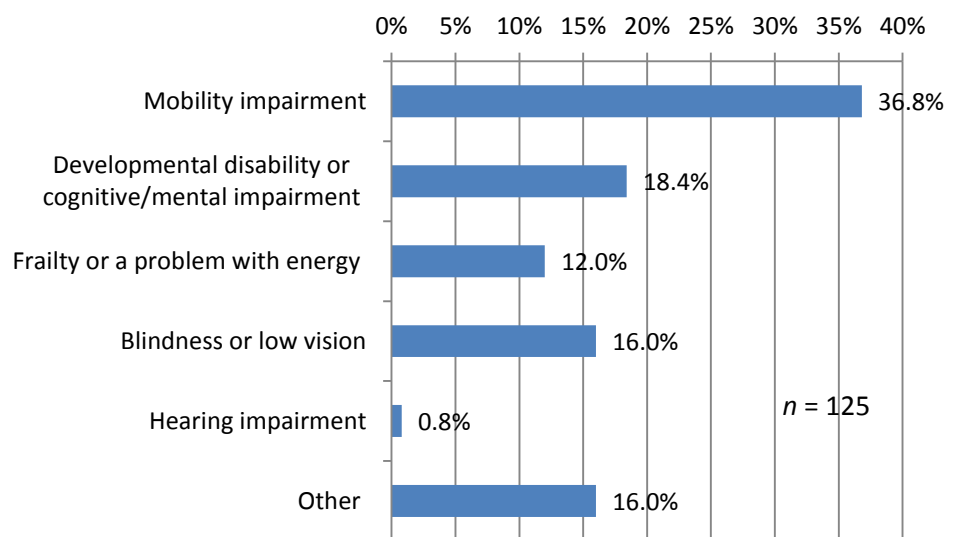
#### Final Report

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#### *Question: What would you say is the main disability or disabling condition that causes you to use Dial-A-Lift?*

Mirroring responses from the previous question, the largest percentage of respondents (36.8 percent) indicated a mobility impairment as the primary disability or disabling condition resulting in use of DAL. Developmental disabilities and cognitive/mental impairments were the second-most common response (18.4 percent). As in the previous question, the most common “other” responses also included respondents who had difficulty with stairs or indicated they could only walk limited distances. While it is possible the “other” respondents could have a mobility impairment, it is also possible such limitations can be attributed to other factors such as time of day or weather conditions.

Exhibit 2.20 Primary Disability or Disabling Condition



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### *Cross-Tabulation: Primary Disability vs. Overall Services Satisfaction Rating*

In an attempt to identify potential areas of improvement in the DAL experience, Moore & Associates ran a data cross-tabulation to determine the overall satisfaction levels of each category of disability. (The theory being that if respondents within, for example, the mobility impairment category reported especially low satisfaction levels, Intercity Transit could then investigate the reasons for such dissatisfaction and prepare a response to address same.)

For the satisfaction rating question, respondents were asked to rate their satisfaction level as “Very Satisfied,” “Somewhat Satisfied,” “Somewhat Dissatisfied,” or “Very Dissatisfied.” The system-wide satisfaction ratings for responses are presented in Exhibit 2.1 (slightly more than 77 percent of current users indicated they were “Very Satisfied” with DAL services). For the purposes of this data cross-tabulation, satisfaction levels were assigned ratings based on a four-point scale, with “Very Satisfied” equaling four points, “Somewhat Satisfied” equaling three points, and so on. A mean rating was then calculated.

When comparing the ratings within the varying categories of primary disabilities, it becomes clear respondents in all categories reported similar satisfaction levels, with nearly every category identifying a mean rating between 3.75 and 3.71. The exception was the “other” category, which provided the highest mean rating (3.93 percent). At least 96 percent of respondents in each category reported being “Very Satisfied” or “Somewhat Satisfied.”

Exhibit 2.20.a Primary Disability vs. Overall Services Satisfaction Rating

Disability	Mean Rating	Percent Very or Somewhat Satisfied
Mobility Impairment	3.75	96.4%
Developmental Disability	3.71	96.6%
Frailty Problem	3.73	97.9%
Blindness or low vision	3.71	96.1%
Hearing Impairment	3.75	100.0%
Other	3.93	100.0%





# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

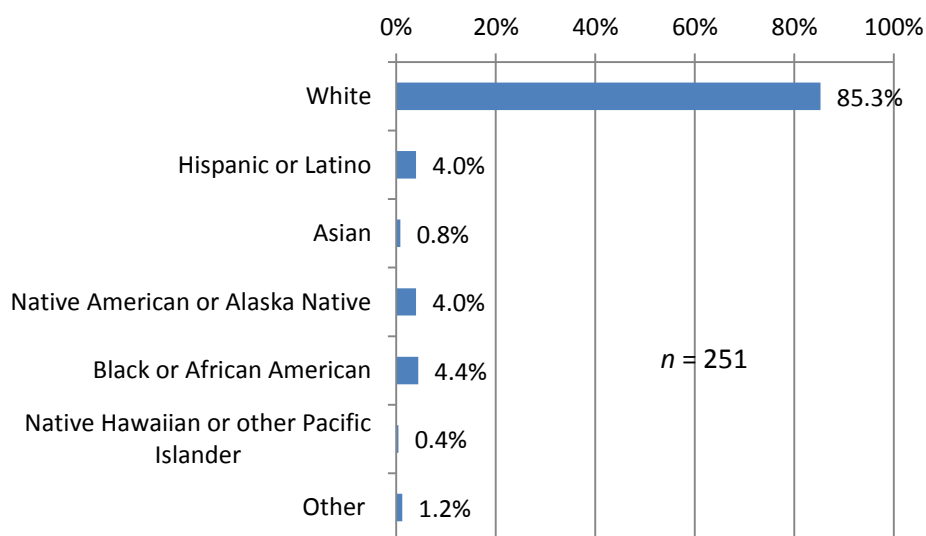
## Intercity Transit

### Final Report

#### Question: Which of the following categories best describes your race or ethnic identification?

More than 85 percent of respondents self-identified as Caucasian or “white.” The second-most common response was African-American, reported by 4.4 percent, followed closely by Hispanic or Latino and Native American, each selected by 4.0 percent.

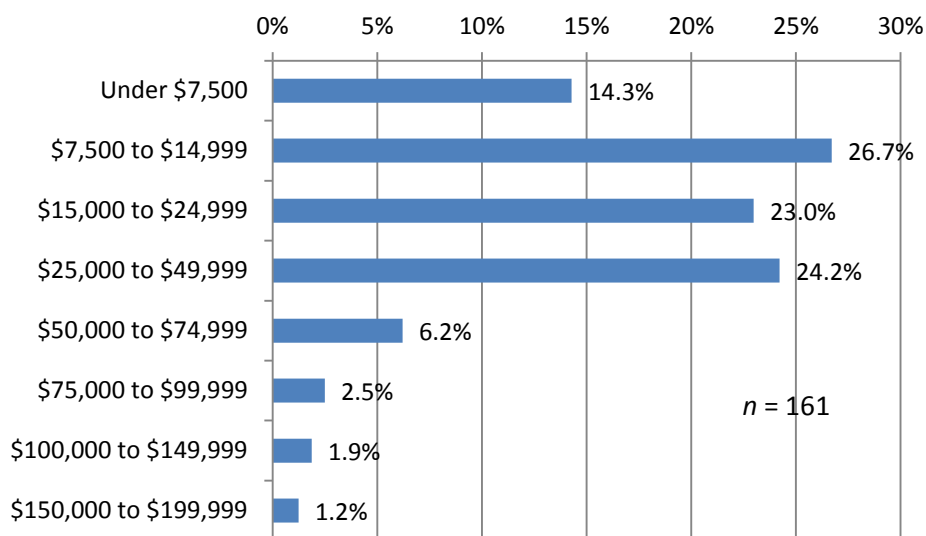
Exhibit 2.21 Race or Ethnicity



#### Question: What is your total annual household income?

Forty-one percent of respondents reported a total annual household income under \$15,000. An additional 23.0 percent indicated an income between \$15,000 and \$24,999, meaning 64 percent reported earning less than \$25,000 per year. The second-most common response was between \$25,000 and \$49,999, cited by 24.2 percent.

Exhibit 2.22 Annual Household Income



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

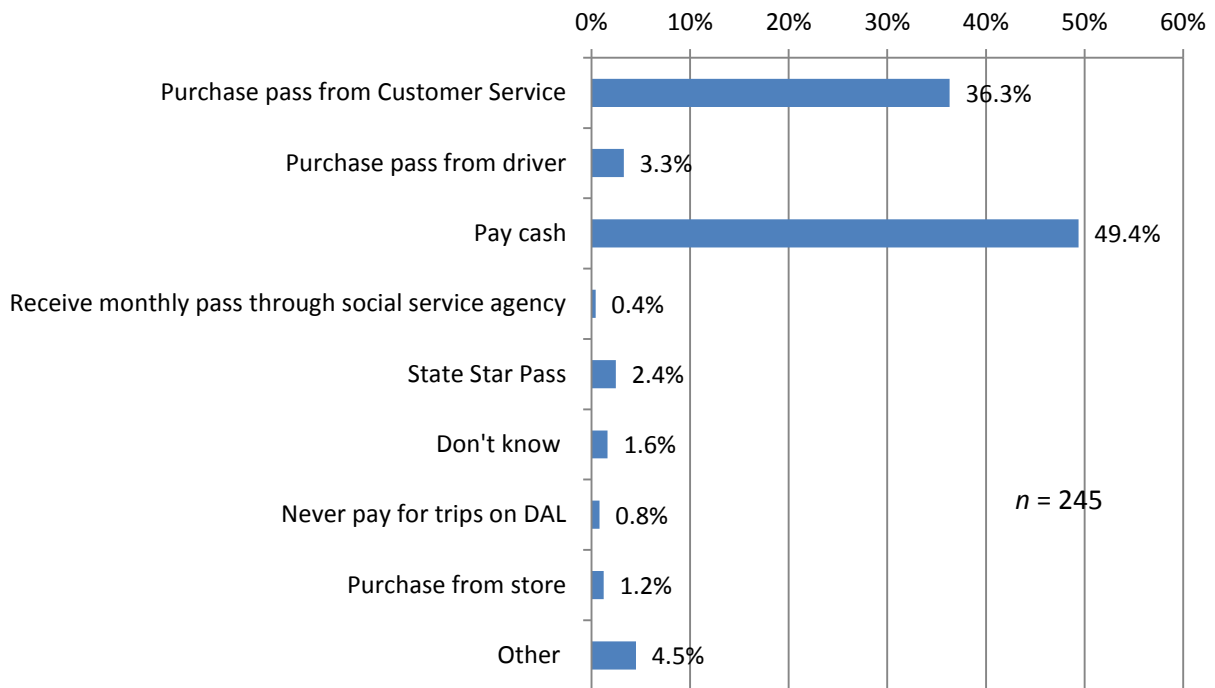
## Intercity Transit

### Final Report

#### Question: How do you usually pay for your trips on Dial-A-Lift?

Nearly half of all respondents reported paying their DAL fare in cash. More than 36 percent reported purchasing a pass from DAL Customer Service.

Exhibit 2.23 Payment Method



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

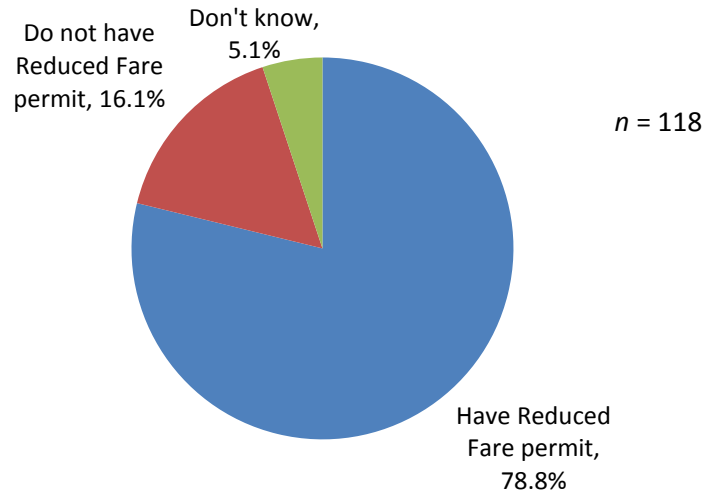
### Final Report

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#### **Question: Do you currently have a Reduced Fare Permit?**

Nearly 79 percent of respondents reported having a Reduced Fare permit.

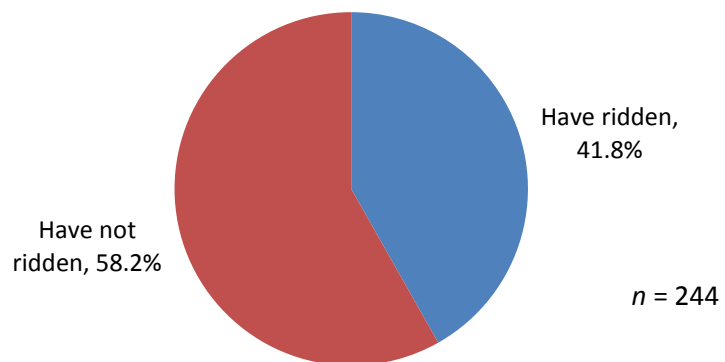
Exhibit 2.24 Reduced Fare Permit



#### **Question: Have you ridden on regular public transit since you have been disabled (in your adult life)?**

More than 58 percent of respondents indicated they have not used regular public transit as adults since they have become disabled.

Exhibit 2.25 Regular Public Transit Usage



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

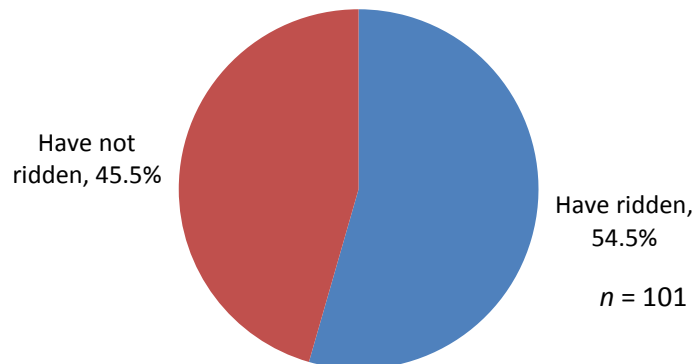
## Intercity Transit

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#### *Question: Have you ridden on regular public transit in the last month?*

The respondents who indicated they had ridden regular public transit as adults after becoming disabled were asked if they had ridden regular public transit within the month prior to survey contact. Nearly 55 percent of respondents reported they had ridden within the month prior to survey contact.

Exhibit 2.26 Regular Public Transit Usage Within the Past Month



#### *Alternative Transportation Services Questions*

#### *Question: Have you used any of the following types of transportation in the past month?*

The next group of questions attempted to quantify usage of alternative transportation types, including Medicaid transportation services, veterans transportation services, senior center shuttles, and taxi service. Less than five percent of respondents had utilized any of these services with the exception of taxis, which had been used by 13.1 percent of respondents within the month prior to survey contact.

Exhibit 2.27 Medicaid Transportation Services Usage

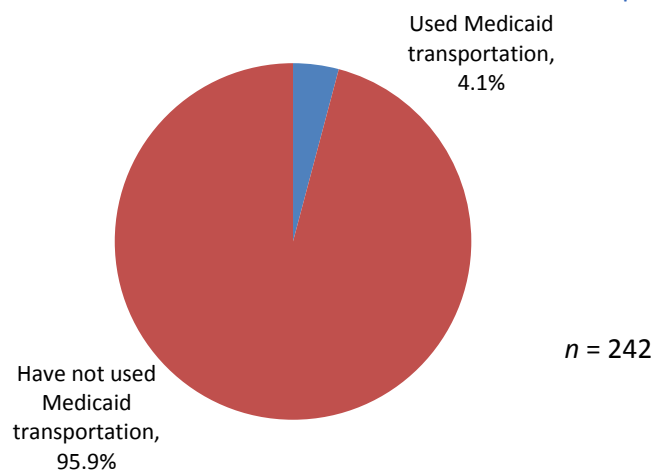


Exhibit 2.27.a Veterans Transportation Services Usage



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

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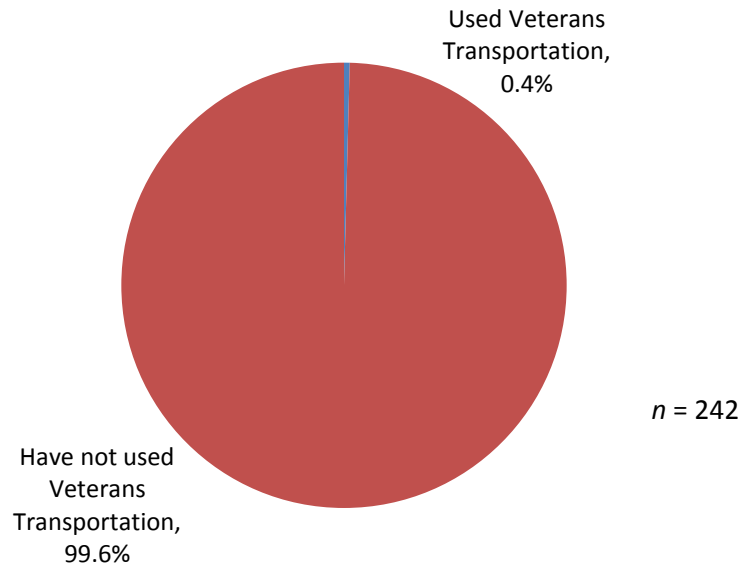
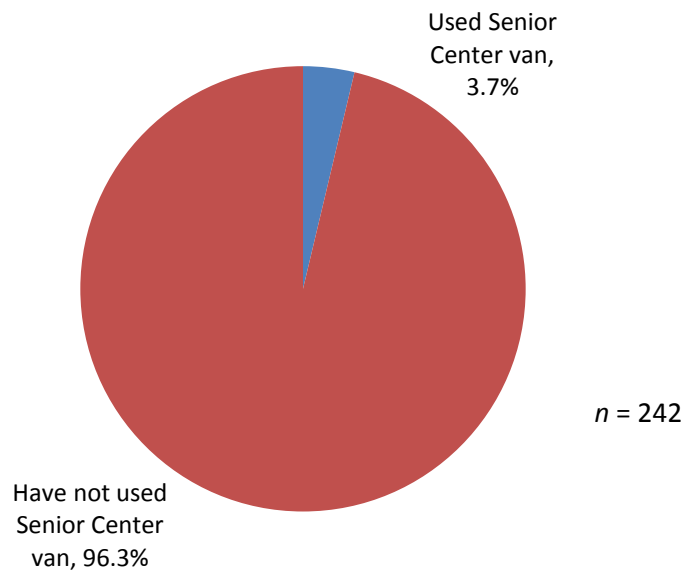


Exhibit 2.27.b Senior Center Shuttle Usage



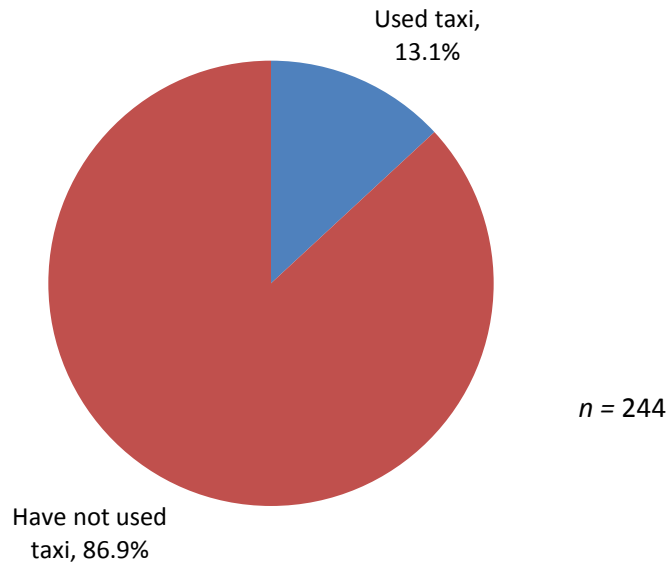
# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

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Exhibit 2.27.c Taxi Usage

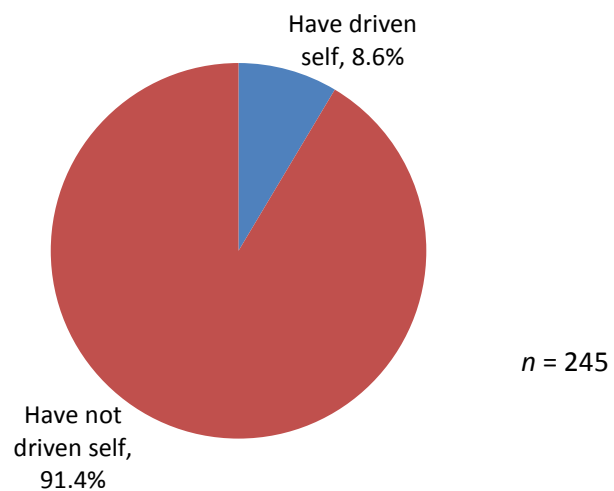


### Car Usage Questions

The following two survey questions attempted to quantify personal vehicle use among respondents. As Exhibit 2.27 illustrates, 91.4 percent of respondents reported they had not operated a personal vehicle within the month prior to survey contact. However, as Exhibit 2.28 indicates, 79.5 percent had ridden as passengers within the prior month.

*Question: Have you driven yourself in a car in the past month?*

Exhibit 2.28 Personal Vehicle Operation



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

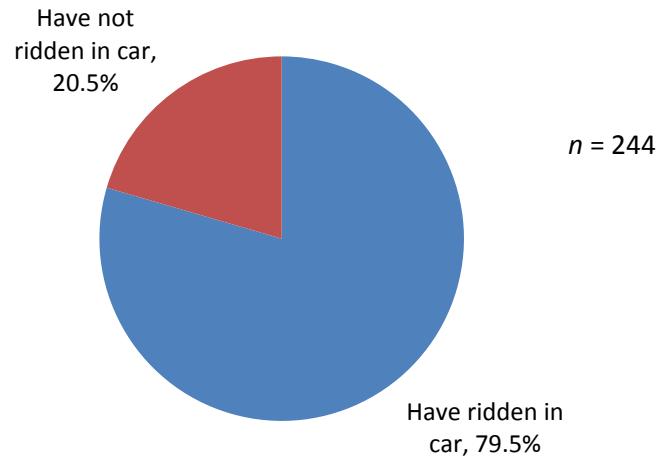
## Intercity Transit

### Final Report

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*Question: Have you ridden in a car with others in the past month?*

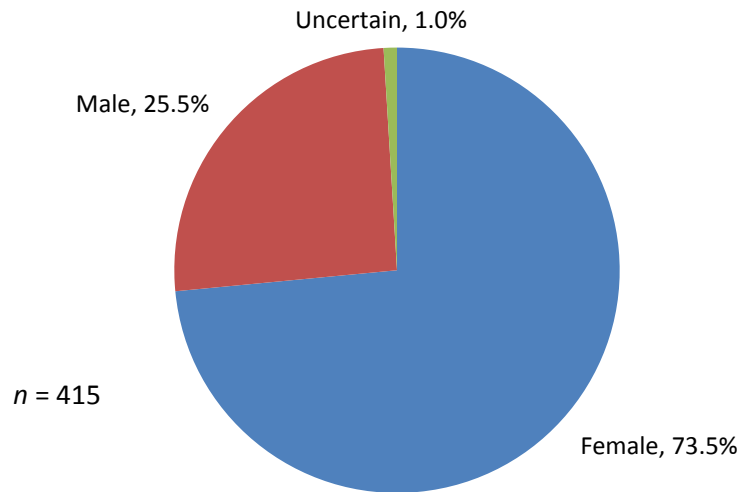
Exhibit 2.29 Personal Vehicle Ridership



### *Passenger gender.*

At the end of each call, surveyors were asked to record the interviewee's gender. Nearly 74 percent of were identified as female.

Exhibit 2.30 Gender



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

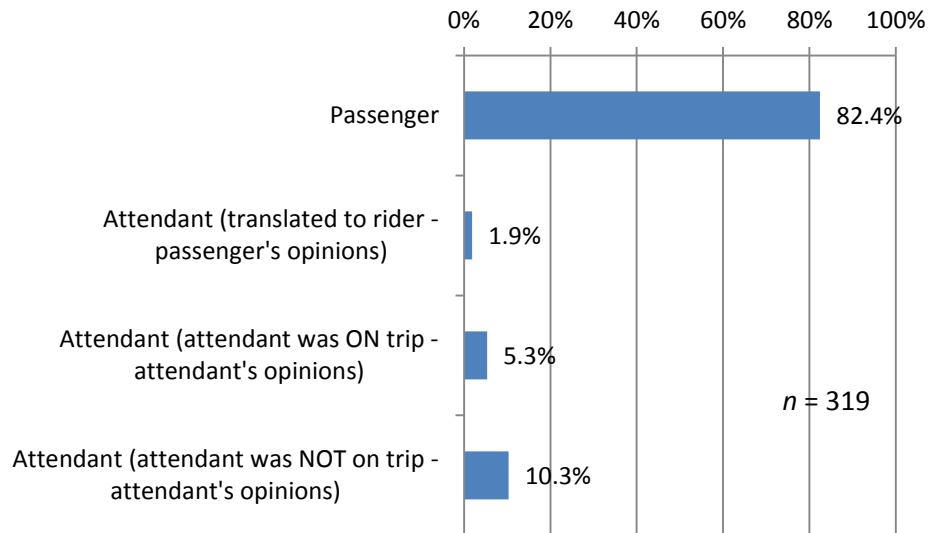
### Final Report

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#### *Survey respondent identity.*

More than 82 percent of survey respondents were DAL passengers who were speaking for themselves. Approximately 18 percent of the surveys were completed by personal care attendants.

Exhibit 2.31 Respondent Identity





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## Section 3

# Non-Rider Survey

In fall 2015, Intercity Transit commissioned a survey of persons who do not ride its Dial-A-Lift (DAL) Americans with Disabilities Act paratransit service even though they are eligible to do so. Feedback from non-riders would help guide service evaluation and potential areas of improvement.

The pool of survey respondents for the non-rider survey arose from a list of telephone numbers provided by Intercity Transit. These individuals are eligible to use the service but at the time of survey contact had not recently done so.

By speaking to non-riders, Intercity Transit hoped to:

- Identify barriers to using the DAL service,
- Identify service improvements that could entice eligible non-riders to use the service, and
- Update the 2011 baseline data as a basis for future-year comparisons.

The survey instrument and data frequencies of responses are included in the appendices of this report.

### Survey Development and Administration

The DAL Non-Rider Survey was developed in conjunction with Intercity Transit staff, utilizing the survey instrument from the DAL non-rider survey conducted in 2011. Utilizing the same instrument supports trend analysis.

Moore & Associates uploaded the survey instrument to Survey Monkey to support complementary online data collection. To promote the survey, a pre-survey postcard was distributed to current and inactive DAL patrons in the database provided by Intercity Transit. The postcard had two objectives: to communicate the legitimacy of the DAL phone survey within the target audience and to encourage participation.

### Data Collection

Moore & Associates developed a sampling plan designed to achieve a sample target of 100 respondents. Data was collected during October and November 2015 using a telephone survey methodology supplemented by the online survey. A surveyor completed a survey by reading each question along with potential responses. Surveyors documented any additional information a respondent may provide.

All phone calls were conducted by trained bilingual surveyors and monitored by supervisory staff. Phone numbers called were strictly limited to those provided by Intercity Transit. Households where contact was not completed were called a maximum of three times, after which the phone number was retired. When initiating a phone call, surveyors introduced themselves as calling on behalf of Intercity Transit and asked permission to conduct the survey. Upon receiving consent, a question was asked to clarify if the contactee was the person listed in the database or a relative or personal care assistant answering on behalf of the DAL user.

# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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When necessary, surveys were conducted through a TTY or through Washington Relay Service, the free service provided by the Washington State Office of the Deaf and Hard of Hearing (ODHH), to enable people who are hearing impaired to participate in the survey.

Surveyors conducted the survey by reading each question along with potential responses. Trained surveyors were responsible for completing the survey with the respondent, including documenting any additional information the respondents may have provided. If a respondent was unclear as to a question or response, the surveyor assisted by providing clarification while not “leading” the participant.

Data collection for the non-rider survey resulted in a sample of 116 respondents. There were no surveys completed online.

Upon data cleaning and analysis, it was determined many of the surveyed individuals originally determined to be non-riders were current users of the DAL service and therefore ineligible for the purposes of the non-rider survey. Removing these samples resulted in a revised sample of 84.

### Data Processing

All non-rider survey data was entered into Microsoft Excel using trained personnel. Supervisors reviewed data entry work on a daily basis while also conducting spot-checks throughout each day.

Data cleaning was undertaken by trained personnel following completion of data entry. This process resolved variations in data formatting that resulted in identical responses being sorted as different (i.e., “blind” and “BLIND” were cleaned to form one response). The cleaned data was then imported into a Statistical Package for the Social Sciences (SPSS) database for further analysis.

The SPSS database allowed the consultant to compile simple frequencies as well as perform data cross-tabulations within relevant datasets. Data cross-tabulations allow comparisons between survey responses that can provide additional insight into customer profiles, travel patterns, perceptions of service, and demographics.

### Survey Findings

#### *“Typical” Non-Rider Respondent Profile*

By analyzing the simple frequencies arising from the collected data, Moore & Associates compiled a profile of the “typical” non-rider. The profile non-rider:

- Is female,
- Self-identifies as Caucasian,
- Has a total annual household income of \$24,999 or less,
- Is satisfied with DAL interactions to this point,
- Has not recently utilized regular public transit, and
- Has other transportation options that motivate the lack of DAL use.

Nearly 10 percent of respondents expressed interest in the service yet reside outside the service area—in some cases, a mile or less outside the service area. Slightly more than 13 percent of respondents



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

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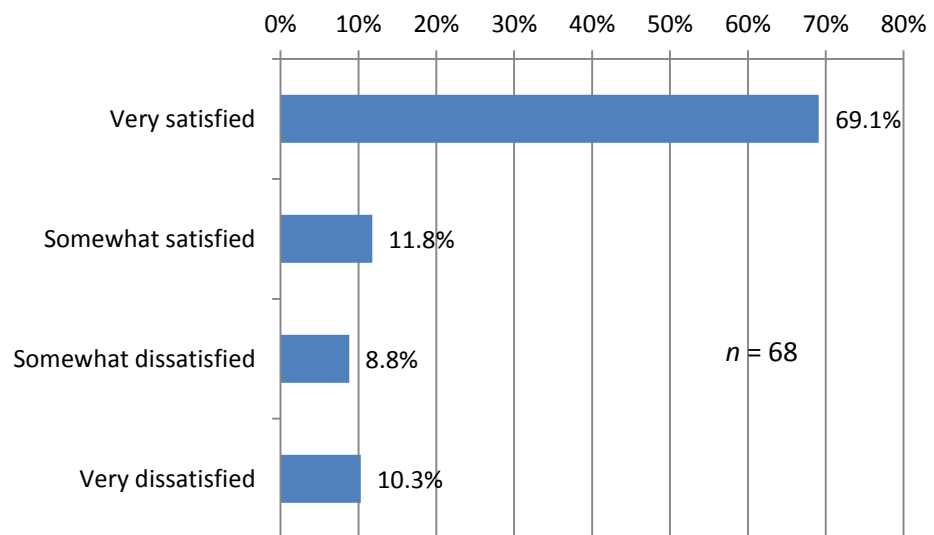
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reported difficulty completing their registration for the service. If Intercity Transit wishes to recruit more riders from its database of non-riders, these two issues should be explored.

*Question: Even though you have not ridden Dial-A-Lift before, think of your experience with the program so far, including registration for the service. Which of the following best describes your rating of your overall experience with Dial-A-Lift?*

Slightly more than 69 percent of respondents reported being “Very Satisfied” with their DAL experience, including the registration process. An additional 11.8 percent reported being “Somewhat Satisfied.” Less than 20 percent identified as being “Somewhat Dissatisfied” or “Very Dissatisfied.”

Exhibit 3.1 Satisfaction of DAL Experience



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

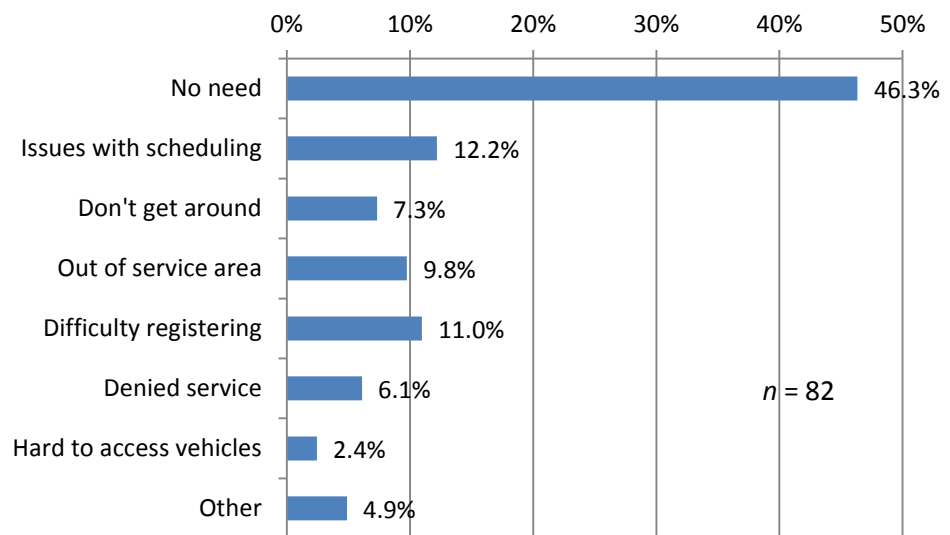
## Intercity Transit

### Final Report

#### Question: What is the main reason you don't ride Dial-A-Lift? Any other reasons?

Reported barriers to DAL usage were varied, yet some patterns emerged. Slightly more than 46 percent indicated they had no need because they could get a ride or could drive themselves. Nearly 10 percent of respondents expressed interest in the service but indicated they lived outside the service area. (Note: Two additional respondents, counted among the "other" respondents in Exhibit 3.2, had moved away from the service area.) Eleven percent had issues with program registration, such as submitting incomplete applications. More than 12 percent cited scheduling difficulties or lack of available vehicles.

Exhibit 3.2 Reason for Not Using DAL



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

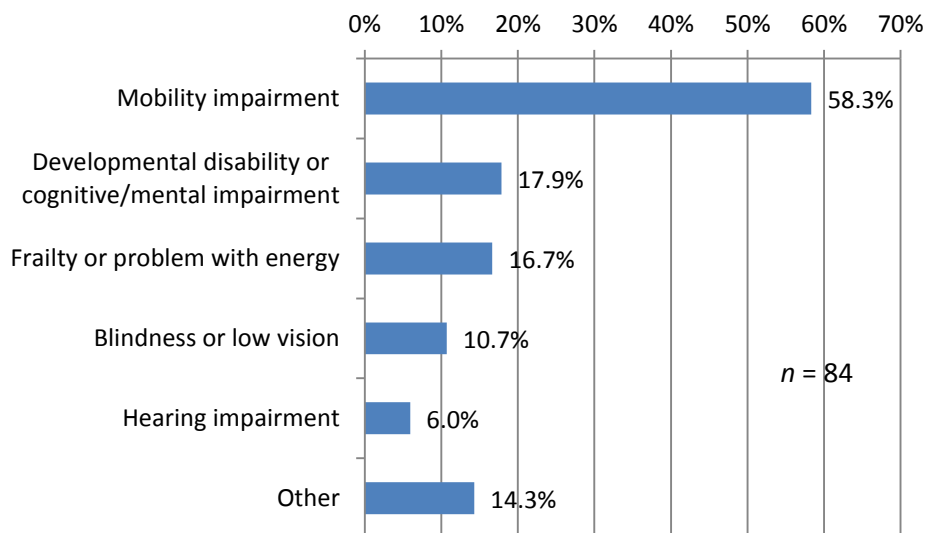
### Demographic Questions

The next section of the survey included questions designed to verify respondents reflected a cross-section of the DAL customer base. Demographic questions included questions about disabilities as well as questions about race/ethnicity and annual income.

#### *Question: Can you please tell me what disability or disabling conditions are the main reasons you registered to use Dial-A-Lift rather than the regular bus?*

Respondents were invited to select all the disabilities or disabling conditions motivated them to register for DAL. Mobility impairments, selected by 58.3 percent of respondents, were the most common response, followed by developmental disabilities or cognitive/mental impairments (17.9 percent). "Other" responses included "cancer" and "migraines and blood clots."

Exhibit 3.3 Disability or Disabling Conditions



Although mobility impairment was the most common response among current riders (42.5 percent), this is a smaller percentage than the 58.3 percent of non-riders reporting the same condition. Non-riders were also more likely to cite a hearing impairment (1.2 percent of current riders). Current riders were more likely to cite blindness or low vision (15.7 percent).

# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

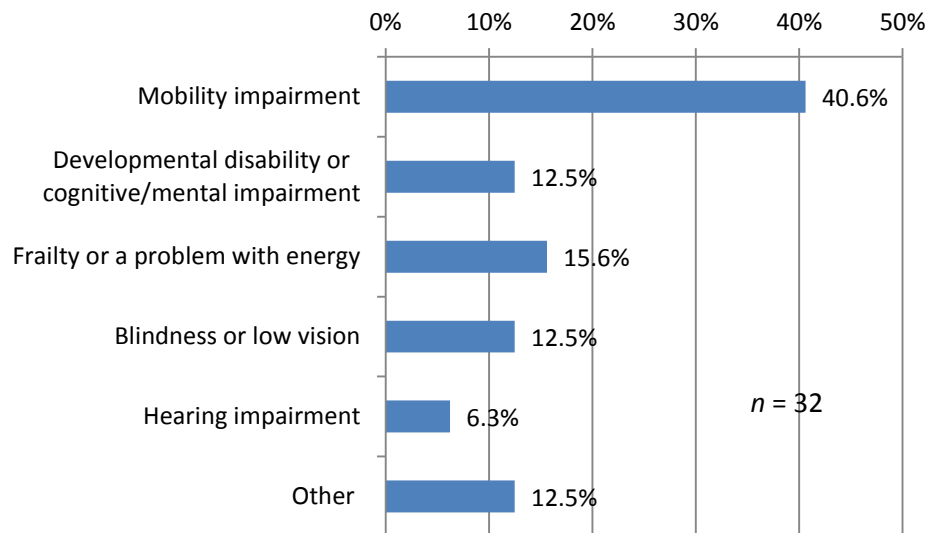
## Intercity Transit

### Final Report

#### Question: What would you say is the main disability or disabling condition that causes you to use Dial-A-Lift?

Respondents who selected more than one disability in the previous question were asked to specify the disability or disabling condition which caused them to register for DAL. Mirroring the responses above, mobility impairment was the most common response (40.6 percent). “Other” responses included “sunlight sensitivity” and “back injury.”

Exhibit 3.4 Primary Disability or Disabling Condition



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

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#### Cross-Tabulation: Primary Disability vs. Satisfaction Rating

Exhibit 3.4.a summarizes the satisfaction levels of respondents within each of the primary disability categories. The highest satisfaction levels were indicated by respondents in the “frailty” category, with 100 percent of respondents reporting that they were “Very Satisfied.” The lowest rating was reported by respondents in the “blindness/low vision” category, with 62.5 percent of respondents indicating they were “Very Satisfied” or “Somewhat Satisfied.”

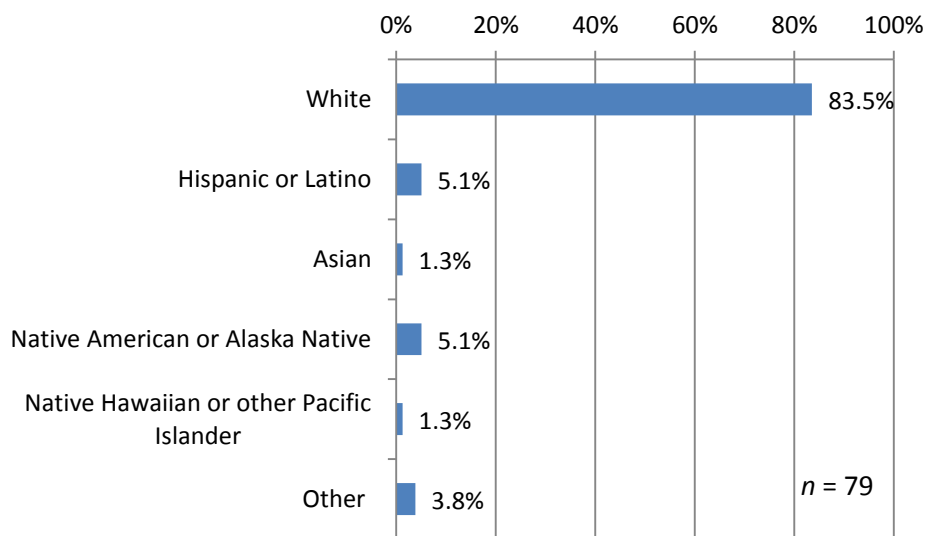
Exhibit 3.4.a Primary Disability vs. Satisfaction Rating

Disability	Mean Rating	Percent Very or Somewhat Satisfied
Mobility Impairment	3.28	79.1%
Developmental Disability	3.54	84.6%
Frailty	4.00	100.0%
Blindness or low vision	3.00	62.5%
Hearing impairment	3.50	75.0%
Other	4.00	100%

#### Question: Which of the following categories best describes your race or ethnic identification?

Nearly 84 percent of respondents self-identified as “white.” Hispanic/Latino and Native American or Alaskan tied for second-most popular response at 5.1 percent. No respondent self-identified as African-American.

Exhibit 3.5 Race or Ethnicity





# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

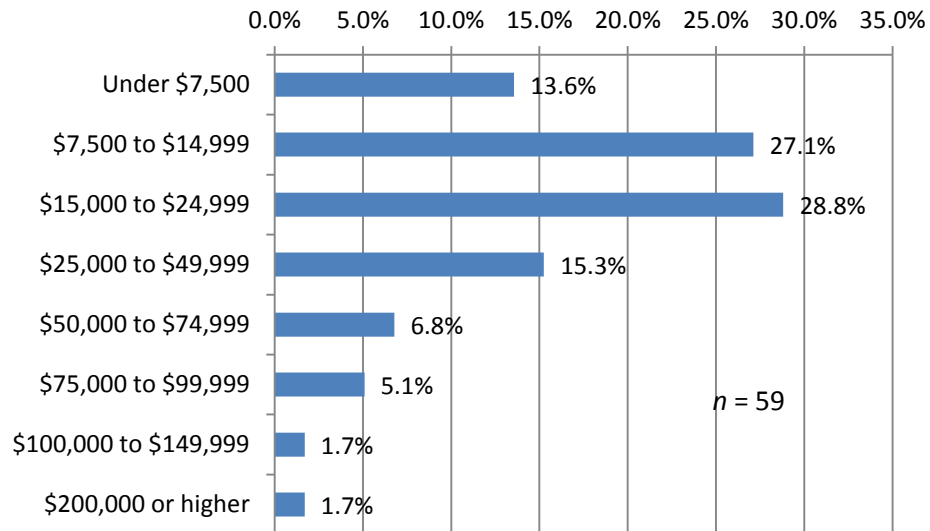
## Intercity Transit

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#### Question: What is your total annual household income?

The most common total annual household income range selected was \$15,000 to \$24,999, selected by 28.8 percent of respondents. Slightly more than 27 percent reported a total annual household income of \$7,500 to \$14,999. The 40.7 percent of non-riders citing an annual income less than \$15,000 was similar to the 41 percent of current riders indicated the same. However, 15.3 percent of non-riders indicated an annual income of \$50,000 or more, compared to 11.8 percent of non-riders.

Exhibit 3.6 Annual Household Income



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

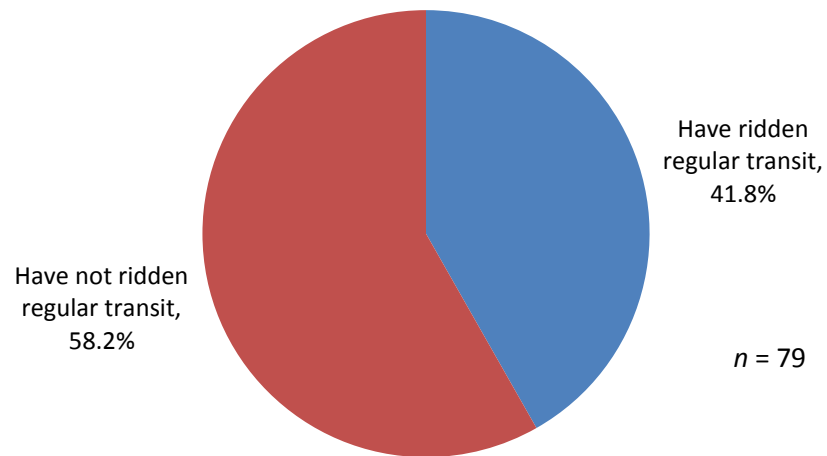
### Final Report

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**Question: Have you ridden on regular public transit since you have been disabled (in your adult life)?**

Slightly more than 58 percent of respondents indicated they have not ridden regular public transit as adults subsequent to their disabled certification.

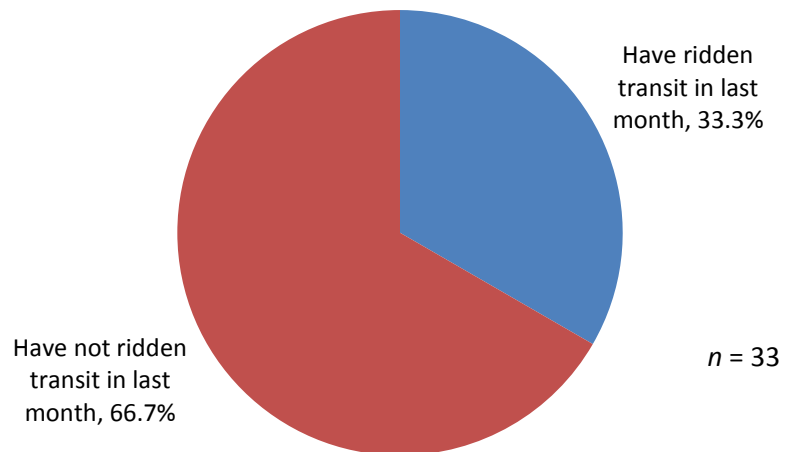
Exhibit 3.7 Regular Public Transit Usage



**Question: Have you used regular public transit in the past month?**

Nearly 67 percent of respondents who reported riding public transit indicated they had not used it within the month prior to survey contact.

Exhibit 3.8 Regular Public Transit Usage Within the Past Month



### Alternative Transportation Services Questions

#### Question: Have you used any of the following types of transportation in the past month?

The next group of questions attempted to quantify the recent usage of alternative transportation services. Questions were asked regarding the usage of Medicaid transportation, veterans transportation services, senior center van, and taxi services. While the majority of respondents had not used any of these services, 20.3 percent indicated use of taxi services and 10.1 percent had used the senior center van. Non-riders were more likely than current riders to utilize each of these alternative transportation options.

Exhibit 3.9 Medicaid Transportation Services Usage

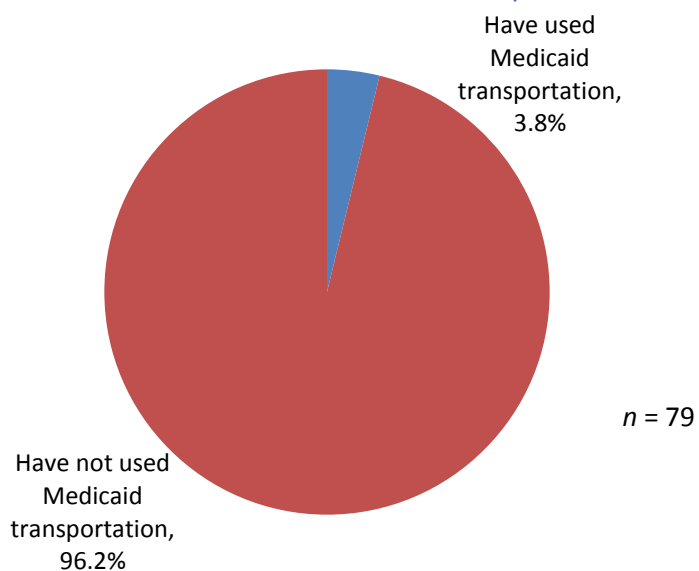
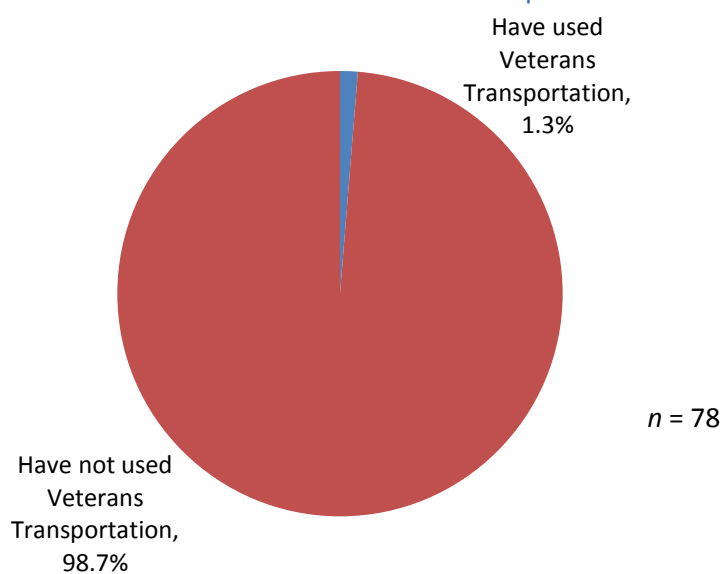


Exhibit 3.9.a Veterans Transportation Services Usage



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

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Exhibit 3.9.b Senior Center Shuttle Usage

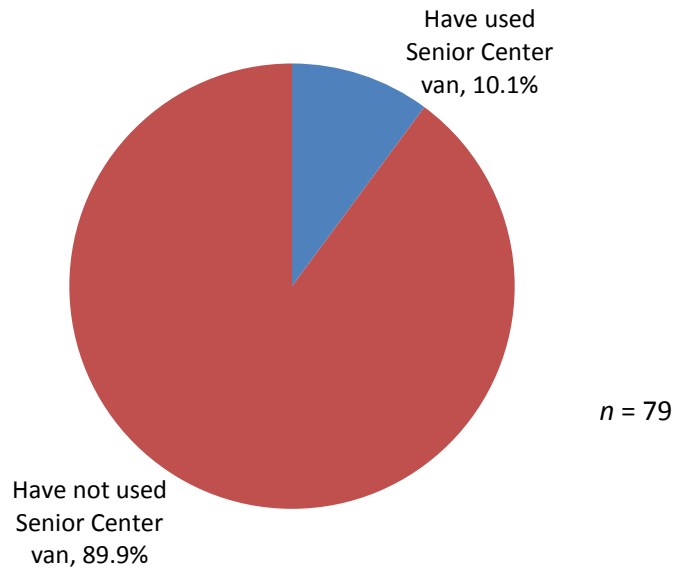
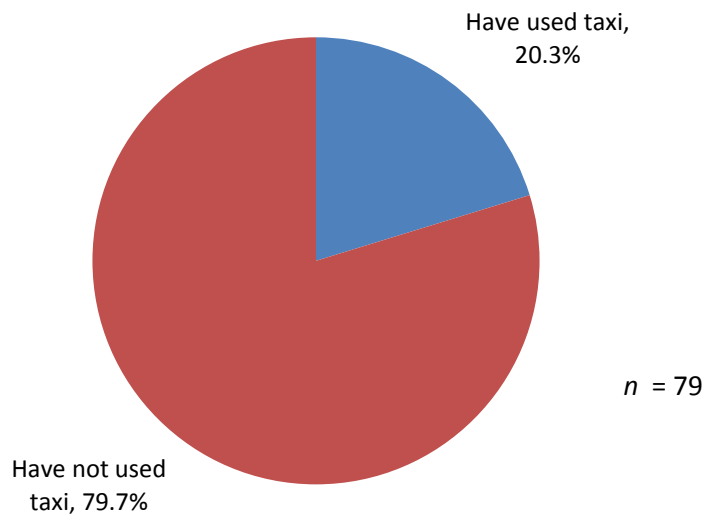


Exhibit 3.9.c Taxi Usage

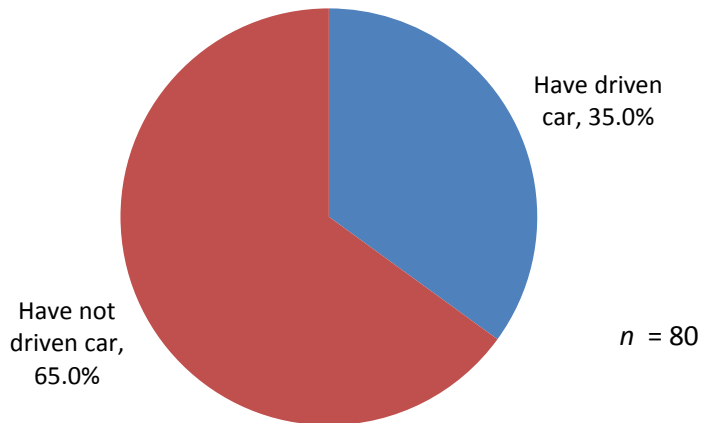


### Car Usage Questions

**Question: Have you driven yourself in a car in the past month?**

Thirty-five percent of respondents indicated they had driven a car in the month prior to survey contact.

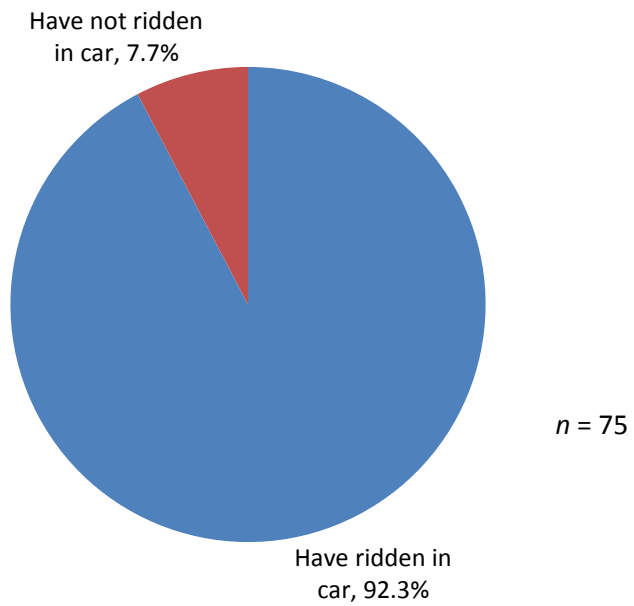
Exhibit 3.10 Personal Vehicle Operation



**Question: Have you ridden in a car with others in the past month?**

Slightly more than 92 percent of respondents had ridden in a car in the month prior to survey contact.

Exhibit 3.11 Personal Vehicle Ridership



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

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**Question: Do you have any other comments about the Dial-A-Lift service, that is to say, anything that you would like to tell us about your experiences with Dial-A-Lift?**

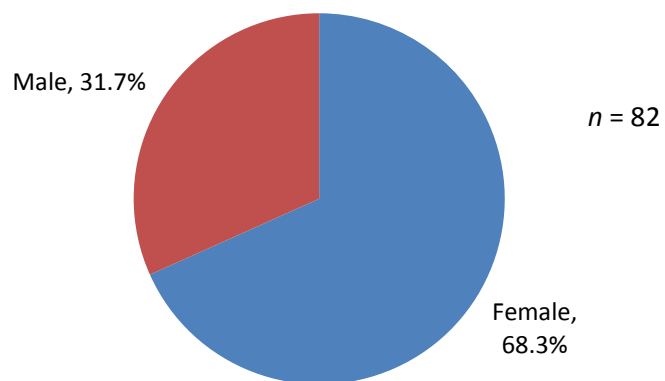
Survey respondents were offered an additional opportunity to provide valuable input for the survey. While the responses varied, a few notable suggestions are provided below:

- An expansion of DAL service to more rural areas would be welcome among multiple non-riders.
- Assistance with the DAL registration process or a simplification of the registration process would be welcomed by many non-riders. If the registration process and support mechanisms are deemed by Intercity Transit to be adequate, perhaps potential riders could be attracted through increased publication of available resources.
- Multiple non-riders indicated hearing positive word-of-mouth about the DAL service.
- An adjustment to the scheduling process would also be welcome by some respondents. One commenter noted difficulty with scheduling rides days in advance, and one commenter reported a declining frequency in use due to a perceived difficulty in scheduling even if calling in advance. A third commenter described scheduling 24 hours in advance an “inconvenience.”

#### **Respondent Gender.**

At the end of each call, surveyors were asked to record the gender of the interviewed respondent. Slightly more than 68 percent of respondents were identified as female.

Exhibit 3.12 Gender



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

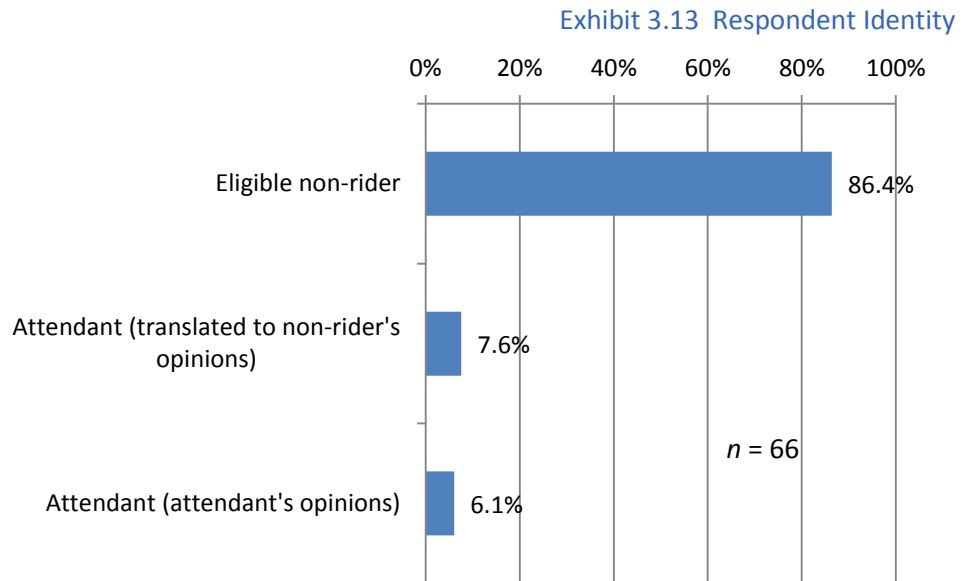
## Intercity Transit

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#### *Respondent Identity.*

Slightly more than 86 percent of respondents were the eligible non-riders themselves.



Appendix A

# Current Rider Survey Instrument





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# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

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#### Customer & Trip Information

1. Name of Customer

2. Date of Trip

3. Departure location

4. Destination

5. Scheduled pickup time

6. Mobility aid

7. Trip number

8. Customer ID number

9. Phone number



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

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#### S1. Customer Participation

Hello, my name is \_\_\_\_\_ and I'm calling on behalf of Dial-A-Lift paratransit service. May I please speak with [Q1]?

Today we're conducting a survey to determine how well Intercity Transit Dial-A-Lift is meeting the needs of its customer and how its services can be improved in the future.

IF NECESSARY, SAY: The purpose of this survey is to let Dial-A-Lift staff know how they are doing in meeting the needs of their customers as a group. Let me assure you that your individual answers will remain anonymous and strictly confidential.

IF NECESSARY, SAY: Is there a better time for me to call back today (tomorrow)?

#### 10. Is customer willing to participate?

- Customer is on line and able to respond
- TDD assistance required - SAY: Dial-A-Lift would very much like to have [Q1] participate in this survey. I can have my supervisor call back to ask [Q1] if s/he would like to participate with the assistance of the State Relay Service. [INTERVIEWER: Add TDD flag to sample if applicable]
- Other assistance required
- Language other than English or Spanish [IF CUSTOMER SPEAKS SPANISH, BILINGUAL INTERVIEWER SHOULD CONTINUE CALL IN SPANISH.]
- Customer unable to complete and has no attendant
- Refusal
- Call not answered/answering machine
- Number not valid (disconnected, wrong number)

Other (please specify)



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### S3. Other Assistance Required

11. Dial-A-Lift would very much like to have [Q1]'s opinions represented in the survey. Would you or another person at this number be able to assist her/him in responding to the survey questions?

- Yes, attendant agrees to "translate" the survey for passenger who was on the trip.
- Passenger unable or refuses but attendant was on trip - conduct survey with attendant who was on trip (ASSISTANT RESPONDENT).
- Passenger has cognitive disability and is unable to respond to survey and attendant was NOT on trip - conduct a short (non-rider) survey with attendant who was not on trip.
- Refusal



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### Satisfaction within last year

12. Thinking about your experience with Dial-A-Lift during the past year, which of the following comes closest to describing your rating of the services provided to you?

#### READ LIST

- Very satisfied
- Somewhat satisfied
- Somewhat dissatisfied, or
- Very dissatisfied
- DO NOT READ: Don't know/refused



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### Reservation in past month

13. Have you personally called Dial-A-Lift to make a reservation for any rides in the past month?

- Yes
- No
- Don't know/refused



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

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#### Attribute rating

14. I'd now like you to think about your experience reserving a ride through Dial-A-Lift over the past month. Please only consider your interaction on the phone with ride schedulers when providing a rating.

READ FOR EACH ATTRIBUTE:

How would you rate the [INSERT ATTRIBUTE]? Would you rate [INSERT ATTRIBUTE] excellent, good, only fair, or poor?

INTERVIEWER NOTE: \*Hours for reservations are 8am-5pm Monday through Friday and 9am-4pm Saturday and Sunday.

	Excellent	Good	Only Fair	Poor	Don't know/refused	Not applicable (didn't have to hold)
Length of time you have to wait on hold before speaking to a ride scheduler	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Courtesy of ride schedulers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The hours* ride schedulers are available to book your trip	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The skill of the ride scheduler in working to meet your reservation needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

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#### Recall of trip

15. For this next set of questions, we are specifically interested in your experience using Dial-A-Ride on [Q2], when you traveled from [Q3] to [Q4].

Although you may have ALSO used Dial-A-Lift to travel in the reverse direction on that day, for these next few questions I would like you to think just about the portion of the trip when you traveled from [Q3] to [Q4] when you were scheduled to be picked up at around [Q5].

IF CONCERNED ABOUT SOURCE OF INFORMATION, SAY:

We are working from schedules provided by Intercity Transit which contain only that information necessary to assist us in conducting this survey. Be assured that your individual responses are strictly confidential and will not be shared with any other party.

Do you recall that you were scheduled to take this particular trip?

- Yes
- No
- Don't know/refused





# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

Did you take this trip?

16. Did you actually take this particular trip?

- Yes
- No
- Don't know/refused

A-10



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

Why did you not take trip?

17. Can you tell me why you didnot take this trip?

DO NOT READ LIST.

- Driver/vehicle never came
- Got sick
- Appointment ran late
- Plans changed/didn't need to go
- Driver didn't help enough
- Don't know/refused
- Other (please specify)

A-11



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### Quality of DAL service

18. Overall, would you say the quality of Dial-A-Lift's service on this trip was... READ LIST

- Excellent
- Good
- Only Fair, or
- Poor
- DON'T READ: Don't know/refused

ASK: Why is that?



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### Pickup time

19. I'd like you to think about your trip on [Q2] at [Q3]. My records indicate your scheduled pick up time was [Q5]. Does that sound correct?

- Yes
- No
- Don't know

20. IF NO, ASK:

What was the scheduled pick up time you were given?

Enter "DON'T KNOW" if unknown.

A-13



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### Driver on time?

21. INTERVIEWER NOTE: IF PROVIDED USE PICK UP TIME PROVIDED BY RESPONDENT

Scheduled pick up time on file: [Q5]

Scheduled pick up time stated by respondent: [Q20]

As you may know, when you make a reservation, Dial-A-Lift gives you a 30-minute time period or "window" during which they will pick you up. The 30-minute window is 15 minutes before and 15 minutes after your scheduled pick up time of \_\_\_\_\_. Your pickup window for this trip was between \_\_\_\_\_ and \_\_\_\_\_. [CALCULATE PICK UP WINDOW]

Did the driver arrive during the pick up window or did he or she arrive before or after the window? IF BEFORE OR AFTER, PROBE: Was the driver a little or very \_\_\_\_\_(early or late)?

- Very early
- A little early
- On time
- A little late
- Very late
- Don't know/refused

A-14



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### Driver arrived early

22. How many minutes before your scheduled pick up window of \_\_\_\_\_ and \_\_\_\_\_ (TIME WINDOW) did the driver arrive?

- Up to 5 minutes early
- 6-10 minutes early
- 11-15 minutes early
- 16-30 minutes early
- 31-60 minutes early
- Don't know

RECORD NUMBER OF MINUTES

A-15



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### Driver arrived late

23. How many minutes after your scheduled pick up window of \_\_\_\_\_ and \_\_\_\_\_ (TIME WINDOW) did the driver arrive?

- Up to 5 minutes late
- 6-10 minutes late
- 11-15 minutes late
- 16-30 minutes late
- 31-60 minutes late
- More than an hour late

RECORD NUMBER OF MINUTES



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

Arrive in time for appointment?

24. If traveling to an appointment, did you arrive in adequate time at your destination?

- Yes
- No
- Not applicable (not traveling to appointment)
- Don't know/can't remember

A-17





# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### Driver announce himself?

25. The next several questions will deal with the various aspects of the driver's help or aid to you on your trip.

Did the driver of this trip you took on [Q2] from [Q3] to [Q4] get out of the vehicle and announce himself/herself to you at your door?

- Yes
- No
- Don't know/don't remember



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### Conclusion/Thank you

47. THANK RESPONDENTS FOR THEIR TIME.

RECORD PASSENGER GENDER. (DO NOT READ).

- Female
- Male
- Uncertain

48. INTERVIEW COMPLETED WITH:

- Passenger
- Attendant (translated to rider - passenger's opinions)
- Attendant (attendant was ON trip - attendant's opinions)
- Attendant (attendant was NOT on trip - attendant's opinions)
- Using State Relay Service (TDD) for interview



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### Waiting outside/at curb?

26. Were you waiting outside or at the curb when the driver arrived?

- Yes
- No
- Don't know/don't remember

A-20



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### Need driver's help?

27. Did you need the driver's help in getting to or from the door, or getting in or out of the vehicle?

- Yes (on at least part of the trip)
- No
- Don't know/don't remember

A-21



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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Did driver help you?

28. Did the driver actually help you?

- Yes (on at least part of the trip)
- No (did not help)
- Don't know/don't remember

A-22



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

Trip Attributes						
29. And, how would you rate the [INSERT ATTRIBUTE]? REPEAT SCALE AS NECESSARY (a-e ATTRIBUTES ARE RANDOMIZED).						
	Excellent	Good	Only Fair	Poor	Don't know/refused	Not applicable
a. Comfort of the ride	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Overall condition of the vehicle INTERVIEWER NOTE: Overall condition of the vehicle includes things like general upkeep, appearance of vehicle, cleanliness of vehicle, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Courtesy of the driver	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Driving skills of the driver	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Condition and ease of use in the seatbelts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. The driver's skill and care in tying down your wheelchair or scooter. INTERVIEWER NOTE: Only ask of wheelchair/scooter riders. CUSTOMER MOBILITY AID: [Q6]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### Purpose of trip

30. What was the purpose of this trip on [Q2]?

DO NOT READ LIST. ACCEPT SINGLE RESPONSE.

IF RESPONDENT SAYS "RETURNING HOME," PROBE: What was the purpose of the trip you were returning from?

- Medical appointment (other than dialysis or rehabilitation).  
IF RESPONDENT SAYS MEDICAL/DOCTOR'S APPOINTMENT, ASK: Was this for dialysis or physical therapy/rehabilitation? IF ONE OF THESE, CODE ACCORDINGLY (CHECK THE APPROPRIATE RESPONSE BELOW).
- Dialysis
- Physical therapy/rehabilitation
- Visiting/recreation/social/out for a meal
- Errands (grocery shopping, bank, drug store, hair appointment, shopping, etc.)
- Employment
- Senior center program
- Church/temple
- Civic purpose or meeting/committee meeting
- Volunteer
- Adult day program
- School/college/vocational training
- Don't know/refused
- Other (please specify)



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### Call Customer Service?

31. This next question is more general in nature, not just related to the specific trip we have been discussing.

In the past month, did you call Dial-A-Lift for information or customer service (e.g., for any reason other than to make a reservation)?

- Yes
- No
- Don't know

A-25





# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### Purpose of Customer Service call

32. What was the main purpose of your most recent call?

- No show or cancellation issues
- Question related to a ride you were taking (i.e., Where's my ride?)
- Change reservation (pick up, drop off, date, or time)
- Request information
- Complaint
- Request a pass
- Confirm a previous reservation
- Application/eligibility
- Commendation
- Change address
- Can't remember/refused
- Other (please specify)



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### Customer Service attributes

33. Thinking about your most recent experience with Customer Service other than making a reservation, how would you rate the [INSERT ATTRIBUTE]? Would you rate [INSERT ATTRIBUTE] excellent, good, only fair, or poor? And how would you rate the [INSERT ATTRIBUTE]?

REPEAT SCALE AS NECESSARY. ATTRIBUTES ROTATE RANDOMLY.

	Excellent	Good	Only Fair	Poor	Don't know/refused	Not applicable (didn't have to hold)
Length of time on hold before speaking to a customer service agent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The length of time it took to finish the entire call	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The courtesy of the customer service agent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The skill of the customer service agent in handling your question or dealing with your problem	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



#### Infrequent Riders

34. What is the main reason you don't ride Dial-A-Lift more often? Any other reasons?

DO NOT READ RESPONSES.

- Have other transportation/use as a backup
- Only use for doctor's appointments
- Don't travel much/unable to travel
- Other transportation easier/more convenient/comfortable/faster
- Cost/can't afford to travel
- Travel outside DAL service area
- Disability no longer requires DAL
- Not taking trips where used DAL
- Want to save it for those who need it
- Bad experience with DAL
- Other (please specify)



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### DEMOGRAPHICS - Disability

35. The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders.

Can you please tell me what disability or disabling conditions are the main reasons you use Dial-A-Lift rather than the regular bus? READ LIST IF NECESSARY.

INTERVIEWER NOTE: If completing the survey with the assistance of an attendant, continue to make sure the responses reference the passenger, not the attendant.

- A mobility impairment - whether you use a wheelchair or can walk (if asked for examples say, "for example, paralysis, arthritis, cerebral palsy")
- A developmental disability or cognitive/mental impairment (if asked for examples say, "for example, memory loss, Down's Syndrome, brain injury, mental illness, stroke")
- Frailty or a problem with energy (if asked for examples say, "for example, asthma, AIDS, kidney failure, the frailties of old age, congestive heart failure, COPD")
- Blindness or low vision
- Hearing impairment
- Refused (DO NOT READ)
- Other (please specify) (DO NOT READ)



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

36. IF MORE THAN ONE DISABILITY IN THE PREVIOUS QUESTION, ASK:

What would you say is the main disability or disabling condition that causes you to use Dial-A-Lift?

- A mobility impairment - whether you use a wheelchair or can walk (if asked for examples say "for example, paralysis, arthritis, cerebral palsy")
- A developmental disability or cognitive/mental impairment (if asked for examples say "for example, memory loss, Down's Syndrome, brain injury, mental illness, stroke")
- Frailty or a problem with energy (if asked for examples say "for example, asthma, AIDS, kidney failure, the frailties of old age, congestive heart failure, COPD")
- Blindness or low vision
- Hearing impairment
- Refused (DO NOT READ)
- Other (please specify) (DO NOT READ)



Race/ethnicity

37. Which of the following categories best describes your race or ethnic identification?

READ LIST. ACCEPT MULTIPLE RESPONSES.

- White
- Hispanic or Latino
- Asian
- Native American or Alaska Native
- Black or African American
- Native Hawaiian or other Pacific Islander
- Refused (DO NOT READ)
- Other (please specify)



#### Household income/DAL payment

38. What is your total annual household income?

READ LIST IF NECESSARY.

- Under \$7,500
- \$7,500 to \$14,999
- \$15,000 to \$24,999
- \$25,000 to \$49,999
- \$50,000 to \$74,999
- \$75,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 to \$199,999
- \$200,000 or higher
- Refused (DO NOT READ)
- Don't know (DO NOT READ)

39. How do you usually pay for your trips on Dial-A-Lift? (READ LIST)

- Purchase daily, monthly, or yearly pass from Customer Service
- Purchase pass from driver
- Pay cash
- Receive monthly pass through social service agency
- State Star Pass
- Don't know (DO NOT READ)
- Never pay for trips on DAL/Didn't know I had to pay (DO NOT READ)
- Other (please specify)



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### Reduced Fare permit

40. Do you currently have a Reduced Fare Permit?

INTERVIEWER NOTE: Reduced fares only apply to monthly passes on Dial-A-Lift.

- Yes
- No
- Don't know





# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### Other public transit

41. Have you ridden on regular public transit since you have been disabled (in your adult life)?

(Regular public transit examples: bus systems such as Intercity Transit, Pierce Transit, Sound Transit, or other similar systems)

- Yes
- No
- Not applicable (not an adult)
- Refused



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### Public transit in last month

42. Have you used regular public transit in the past month?

- Yes
- No
- Don't know/refused

A-35



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### Other transportation

43. Have you used any of the following types of transportation in the past month?

ORDER ROTATES RANDOMLY; ASK ABOUT EACH ITEM.

	Yes	No	Don't know
Medicaid transportation services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Veteran's transportation service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Senior Center van/shuttle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taxi	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### Car travel

44. Have you driven yourself in a car in the past month?

- Yes
- No
- Don't know/can't remember

45. Have you ridden in a car with others in the past month?

- Yes
- No
- Don't know/can't remember

A-37



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### Comments

46. Do you have any other comments about Dial-A-Lift service, that is to say, anything that you would like to tell us about your experiences with Dial-A-Lift?

PROBE: Anything else?

INTERVIEWER NOTE: If a serious issue is mentioned, especially a safety or security related matter, ask respondent if he/she would like someone from Dial-A-Lift to call him/her regarding the matter. Please ensure respondent that his/her responses on other questions would still remain confidential. Note on action/comment sheet.



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### Conclusion/Thank you

47. THANK RESPONDENTS FOR THEIR TIME.

RECORD PASSENGER GENDER. (DO NOT READ).

- Female
- Male
- Uncertain

48. INTERVIEW COMPLETED WITH:

- Passenger
- Attendant (translated to rider - passenger's opinions)
- Attendant (attendant was ON trip - attendant's opinions)
- Attendant (attendant was NOT on trip - attendant's opinions)
- Using State Relay Service (TDD) for interview



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Appendix B

**Non-Rider Survey Instrument**





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# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### Customer & Trip Information

1. Name of Customer

2. Customer ID

3. Phone number

B-3



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### S1. Customer Participation

Hello, my name is \_\_\_\_\_ and I'm calling on behalf of Dial-A-Lift paratransit service. May I please speak with [Q1]?

Today we're conducting a survey to determine how well Intercity Transit Dial-A-Lift is meeting the needs of its customer and how its services can be improved in the future. Although my records indicate that you are not currently using Dial-A-Lift, we would still like to include your opinions.

Everyone who completes today's survey will be entered into a random drawing for two \$50 VISA gift cards.

Would you be willing to participate in the survey? It only takes a few minutes and all of your responses will remain confidential.

IF NECESSARY, SAY: The purpose of this survey is to let Dial-A-Lift staff know how they are doing in meeting the needs of their customers as a group. Let me assure you that your individual answers will remain anonymous and strictly confidential.

IF NECESSARY, SAY: Is there a better time for me to call back today (tomorrow)?

IF CUSTOMER SPEAKS SPANISH, BILINGUAL INTERVIEWER SHOULD CONTINUE CALL IN SPANISH

#### 4. Is customer willing to participate?

- Customer is on line and able to respond
- TDD assistance required - SAY: Dial-A-Lift would very much like to have [Q1] participate in this survey. I can have my supervisor call back to ask [Q1] if s/he would like to participate with the assistance of the State Relay Service. [INTERVIEWER: Add TDD flag to sample if applicable]
- Other assistance required
- Language other than English or Spanish
- Customer unable to complete and has no attendant
- Refusal
- Call not answered/answering machine
- Number not valid (disconnected, wrong number, etc.)
- Other

Comments



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

#### S3. Other Assistance Required

5. Dial-A-Lift would very much like to have [Q1]'s opinions represented in the survey. Would you or another person at this number be able to assist her/him in responding to the survey questions?

- Yes, attendant agrees to "translate" the survey for passenger.
- Passenger has cognitive disability and is unable to respond to survey - conduct survey with attendant who is familiar with Dial-A-Lift.
- Refusal



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### Satisfaction within last year

6. Even though you have not ridden Dial-A-Lift before, think of your experience with the program so far, including registration for the service. Which of the following best describes your rating of your overall experience with Dial-A-Lift?

#### READ LIST

- Very satisfied
- Somewhat satisfied
- Somewhat dissatisfied, or
- Very dissatisfied
- DO NOT READ: Don't know/refused



**2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys**

**Intercity Transit**

**Final Report**

---

7. What is the main reason you don't ride Dial-A-Lift? Any other reasons?



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

8. The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders.

Can you please tell me what disability or disabling conditions are the main reasons you registered to use Dial-A-Lift rather than the regular bus? READ LIST IF NECESSARY.

INTERVIEWER NOTE: If completing the survey with the assistance of an attendant, continue to make sure the responses reference the passenger, not the attendant.

- A mobility impairment - whether you use a wheelchair or can walk (if asked for examples say "for example, paralysis, arthritis, cerebral palsy")
- A developmental disability or cognitive/mental impairment (if asked for examples say "for example, memory loss, Down syndrome, brain injury, mental illness, stroke")
- Frailty or a problem with energy (if asked for examples say "for example, asthma, AIDS, kidney failure, the frailties of old age, congestive heart failure, COPD")
- Blindness or low vision
- Hearing impairment
- Refused (DO NOT READ)
- Other (please specify) (DO NOT READ)



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

9. IF MORE THAN ONE DISABILITY IN THE PREVIOUS QUESTION, ASK:

What would you say is the main disability or disabling condition that causes you to use Dial-A-Lift?

- A mobility impairment - whether you use a wheelchair or can walk (if asked for examples say "for example, paralysis, arthritis, cerebral palsy")
- A developmental disability or cognitive/mental impairment (if asked for examples say "for example, memory loss, Down syndrome, brain injury, mental illness, stroke")
- Frailty or a problem with energy (if asked for examples say "for example, asthma, AIDS, kidney failure, the frailties of old age, congestive heart failure, COPD")
- Blindness or low vision
- Hearing impairment
- Refused (DO NOT READ)
- Other (please specify) (DO NOT READ)





# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

10. Which of the following categories best describes your race or ethnic identification?

READ LIST. ACCEPT MULTIPLE RESPONSES.

- White
- Hispanic or Latino
- Asian
- Native American or Alaska Native
- Black or African American
- Native Hawaiian or other Pacific Islander
- Refused (DO NOT READ)
- Other (please specify)

B-10



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

11. What is your total annual household income?

READ LIST IF NECESSARY.

- Under \$7,500
- \$7,500 to \$14,999
- \$15,000 to \$24,999
- \$25,000 to \$49,999
- \$50,000 to \$74,999
- \$75,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 to \$199,999
- \$200,000 or higher
- Refused (DO NOT READ)
- Don't know (DO NOT READ)

B-11



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

12. Have you ridden on regular public transit since you have been disabled (in your adult life)?

(Regular public transit examples: bus systems such as Intercity Transit, Pierce Transit, Sound Transit, or other similar systems)

- Yes
- No
- Not applicable (not an adult)
- Refused

B-12



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

13. Have you used regular public transit in the past month?

- Yes
- No
- Don't know/refused

B-13



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

14. Have you used any of the following types of transportation in the past month?

ORDER IS RANDOMIZED; ASK ABOUT EACH ITEM

	Yes	No	Don't know
Medicaid transportation services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Veteran's transportation service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Senior center van/shuttle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taxi	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

B-14



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

15. Have you driven yourself in a car in the past month?

- Yes
- No
- Don't know/can't remember

16. Have you ridden in a car with others in the past month?

- Yes
- No
- Don't know/can't remember



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

17. Do you have any other comments about Dial-A-Lift service, that is to say, anything that you would like to tell us about your experiences with Dial-A-Lift?

PROBE: Anything else?

INTERVIEWER NOTE: If a serious issue is mentioned, especially a safety or security related matter, ask respondent if he/she would like someone from Dial-A-Lift to call him/her regarding the matter. Please ensure respondent that their responses on other questions would still remain confidential. Note on action/comment sheet.



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

---

18. THANK RESPONDENTS FOR THEIR TIME.

RECORD PASSENGER GENDER. (DO NOT READ)

- Female
- Male
- Uncertain

19. INTERVIEW COMPLETED WITH:

- Passenger
- Attendant (translated to rider - passenger's opinions)
- Attendant (attendant's opinions)
- Using State Relay Service (TDD) for interview

B-17





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Appendix C

**Current Rider Survey Simple Frequencies**



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# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### Is customer willing to participate?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Customer is on line and able to respond	375	86.4	88.0	88.0
	Other assistance required	49	11.3	11.5	99.5
	Customer unable to complete and has no attendant	2	0.5	0.5	100.0
	Total	426	98.2	100.0	
Missing	System	8	1.8		
Total		434	100.0		

#### Other (please specify)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		424	97.7	97.7	97.7
	Call back later.	1	0.2	0.2	97.9
	Has attendant.	1	0.2	0.2	98.2
	Took survey online.	8	1.8	1.8	100.0
	Total	434	100.0	100.0	

#### Dial-A-Lift would very much like to have [Q1]'s opinions represented in the survey. Would you or another person at this number be able to assist her/him in responding to the survey questions?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes, attendant agrees to "translate" the survey for passenger	11	2.5	22.0	22.0
	Passenger unable or refuses but attendant was on trip - cond	14	3.2	28.0	50.0
	Passenger has cognitive disability and is unable to respond	25	5.8	50.0	100.0
	Total	50	11.5	100.0	
Missing	System	384	88.5		
Total		434	100.0		

#### Thinking about your experience with Dial-A-Lift during the past year, which of the following comes closest to describing your rating of the services provided to you? READ LIST

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very satisfied	335	77.2	77.2	77.2
	Somewhat satisfied	79	18.2	18.2	95.4
	Somewhat dissatisfied, or	10	2.3	2.3	97.7
	Very dissatisfied	6	1.4	1.4	99.1
	DO NOT READ: Don't know/refused	4	0.9	0.9	100.0
	Total	434	100.0	100.0	C-3



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### Have you personally called Dial-A-Lift to make a reservation for any rides in the past month?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	301	69.4	69.7	69.7
	No	118	27.2	27.3	97.0
	Don't know/refused	13	3.0	3.0	100.0
	Total	432	99.5	100.0	
Missing	System	2	0.5		
Total		434	100.0		

#### Length of time you have to wait on hold before speaking to a ride scheduler

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	112	25.8	38.0	38.0
	Good	131	30.2	44.4	82.4
	Only Fair	40	9.2	13.6	95.9
	Poor	6	1.4	2.0	98.0
	Don't know/refused	3	0.7	1.0	99.0
	Not applicable (didn't have to hold)	3	0.7	1.0	100.0
	Total	295	68.0	100.0	
Missing	System	139	32.0		
Total		434	100.0		

#### Courtesy of ride schedulers

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	211	48.6	72.0	72.0
	Good	68	15.7	23.2	95.2
	Only Fair	12	2.8	4.1	99.3
	Don't know/refused	2	0.5	0.7	100.0
	Total	293	67.5	100.0	
Missing	System	141	32.5		
Total		434	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

**The hours\* ride schedulers are available to book your trip**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	135	31.1	45.8	45.8
	Good	130	30.0	44.1	89.8
	Only Fair	22	5.1	7.5	97.3
	Poor	3	0.7	1.0	98.3
	Don't know/refused	4	0.9	1.4	99.7
	Not applicable (didn't have to hold)	1	0.2	0.3	100.0
	Total	295	68.0	100.0	
Missing	System	139	32.0		
Total		434	100.0		

**The skill of the ride scheduler in working to meet your reservation needs**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	165	38.0	55.9	55.9
	Good	102	23.5	34.6	90.5
	Only Fair	21	4.8	7.1	97.6
	Poor	4	0.9	1.4	99.0
	Don't know/refused	3	0.7	1.0	100.0
	Total	295	68.0	100.0	
Missing	System	139	32.0		
Total		434	100.0		

**For this next set of questions, we are specifically interested in your experience using Dial-A-Ride on [Q2], when you traveled from [Q3] to [Q4]. Although you may have ALSO used Dial-A-Lift to travel in the reverse direction on that day, for these next few**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	299	68.9	71.0	71.0
	No	58	13.4	13.8	84.8
	Don't know/refused	64	14.7	15.2	100.0
	Total	421	97.0	100.0	
Missing	System	13	3.0		
Total		434	100.0		C-5



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### Did you actually take this particular trip?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	271	62.4	90.0	90.0
	No	15	3.5	5.0	95.0
	Don't know/refused	15	3.5	5.0	100.0
	Total	301	69.4	100.0	
Missing	System	133	30.6		
Total		434	100.0		

#### Can you tell me why you did not take this trip?DO NOT READ LIST.

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Driver/vehicle never came	2	0.5	15.4	15.4
	Got sick	3	0.7	23.1	38.5
	Appointment ran late	1	0.2	7.7	46.2
	Plans changed/didn't need to go	5	1.2	38.5	84.6
	Don't know/refused	2	0.5	15.4	100.0
	Total	13	3.0	100.0	
Missing	System	421	97.0		
Total		434	100.0		

#### Other (please specify)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		434	100.0	100.0	100.0



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

Overall, would you say the quality of Dial-A-Lift's service on this trip was... READ LIST

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	173	39.9	63.6	63.6
	Good	81	18.7	29.8	93.4
	Only Fair, or	3	0.7	1.1	94.5
	Poor	7	1.6	2.6	97.1
	DON'T READ: Don't know/refused	8	1.8	2.9	100.0
	Total	272	62.7	100.0	
Missing	System	162	37.3		
Total		434	100.0		

ASK: Why is that?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Always comes on time.	421	97.0	97.0	97.0
	Can't remember the details.	1	0.2	0.2	97.2
	Don't have bad memories.	1	0.2	0.2	97.5
	Don't remember (attendant).	1	0.2	0.2	97.7
	Driver very nice. They all are.	1	0.2	0.2	97.9
	Drivers are all awesome, pleasant, willing to listen to my suggestion of what route is best.	1	0.2	0.2	98.2
	Everything went according to plan and the drivers were courteous and helpful.	1	0.2	0.2	98.4
	Got left and don't remember the date.	1	0.2	0.2	98.6
	On time, friendly drivers.	1	0.2	0.2	98.8
	Sometimes, a small number of drivers can be rude.	1	0.2	0.2	99.1
	The timing and the driver's courteous nature.	1	0.2	0.2	99.3
	The van arrives within the half-hour window and gets me to where I need to go in a reasonable time.	1	0.2	0.2	99.5
	We (my guest & myself) were picked up within 5 minutes of time scheduled. Return pick-up was also made with very little wait.	1	0.2	0.2	99.8
	Total	434	100.0	100.0	100.0

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# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

I'd like you to think about your trip on [Q2] at [Q3]. My records indicate your scheduled pick up time was [Q5]. Does that sound correct?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	199	45.9	74.5	74.5
	No	49	11.3	18.4	92.9
	Don't know	19	4.4	7.1	100.0
	Total	267	61.5	100.0	
Missing	System	167	38.5		
Total		434	100.0		

**IF NO, ASK:What was the scheduled pick up time you were given?Enter "DON'T KNOW" if unknown.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		393	90.6	90.6	90.6
	1:07 PM	1	0.2	0.2	90.8
	1:28pm	1	0.2	0.2	91.0
	1:45PM	1	0.2	0.2	91.2
	1:53PM	1	0.2	0.2	91.5
	1:54 PM	1	0.2	0.2	91.7
	1:55 PM	1	0.2	0.2	91.9
	1:59pm	1	0.2	0.2	92.2
	12:00pm	1	0.2	0.2	92.4
	2:00 PM	1	0.2	0.2	92.6
	2:00pm	1	0.2	0.2	92.9
	2:03 PM	1	0.2	0.2	93.1
	2:20 PM	1	0.2	0.2	93.3
	2:30 pm	1	0.2	0.2	93.5
	2:43 PM	1	0.2	0.2	93.8
	2:45pm	1	0.2	0.2	94.0
	2015-11-03 at 2:15pm	1	0.2	0.2	94.2
	3:04PM	1	0.2	0.2	94.5
	3:20pm	1	0.2	0.2	94.7
	3:35 PM	1	0.2	0.2	94.9
	3:43 PM	1	0.2	0.2	95.2
	3:53 pm	1	0.2	0.2	95.4
	4:00 PM	1	0.2	0.2	95.6
	4:00pm	1	0.2	0.2	95.9
	4:06 PM	1	0.2	0.2	96.1
	4:15 pm	1	0.2	0.2	96.3
	4:15 PM	1	0.2	0.2	96.5

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# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

4:15pm	2	0.5	0.5	97.0
4:17 PM	1	0.2	0.2	97.2
4:25pm	1	0.2	0.2	97.5
4:34 PM	1	0.2	0.2	97.7
4:44pm	1	0.2	0.2	97.9
4:59 PM	1	0.2	0.2	98.2
5:01pm	1	0.2	0.2	98.4
5:20PM	1	0.2	0.2	98.6
6:58 PM	1	0.2	0.2	98.8
7:02pm	1	0.2	0.2	99.1
7:49pm	1	0.2	0.2	99.3
8:45pm	1	0.2	0.2	99.5
8:46 PM	1	0.2	0.2	99.8
DON'T KNOW	1	0.2	0.2	100.0
Total	434	100.0	100.0	

**INTERVIEWER NOTE: IF PROVIDED USE PICK UP TIME PROVIDED BY RESPONDENT**  
**Scheduled pick up time on file: [Q5]Scheduled pick up time stated by respondent: [Q20]**  
**As you may know, when you make a reservation, Dial-A-Lift gives you a 30-minute time period or "win"**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Very early	5	1.2	1.9	1.9
A little early	15	3.5	5.7	7.6
On time	200	46.1	75.8	83.3
A little late	9	2.1	3.4	86.7
Very late	6	1.4	2.3	89.0
Don't know/refused	29	6.7	11.0	100.0
Total	264	60.8	100.0	
Missing System	170	39.2		
Total	434	100.0		

**How many minutes before your scheduled pick up window of \_\_\_\_\_ and \_\_\_\_\_ (TIME WINDOW) did the driver arrive?**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Up to 5 minutes early	3	0.7	15.0	15.0
6-10 minutes early	6	1.4	30.0	45.0
11-15 minutes early	5	1.2	25.0	70.0
16-30 minutes early	1	0.2	5.0	75.0
31-60 minutes early	1	0.2	5.0	80.0
Don't know	4	0.9	20.0	100.0
Total	20	4.6	100.0	



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

Missing System	414	95.4		
Total	434	100.0		

#### RECORD NUMBER OF MINUTES

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	434	100.0	100.0	100.0

**How many minutes after your scheduled pick up window of \_\_\_\_\_ and \_\_\_\_\_ (TIME WINDOW) did the driver arrive?**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Up to 5 minutes late	4	0.9	28.6	28.6
	6-10 minutes late	1	0.2	7.1	35.7
	11-15 minutes late	3	0.7	21.4	57.1
	16-30 minutes late	1	0.2	7.1	64.3
	31-60 minutes late	4	0.9	28.6	92.9
	More than an hour late	1	0.2	7.1	100.0
	Total	14	3.2	100.0	
Missing System		420	96.8		
Total		434	100.0		

#### RECORD NUMBER OF MINUTES

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		432	99.5	99.5	99.5
	3	1	0.2	0.2	99.8
	Does not know	1	0.2	0.2	100.0
Total		434	100.0	100.0	



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

**If traveling to an appointment, did you arrive in adequate time at your destination?**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	216	49.8	82.1	82.1
	No	9	2.1	3.4	85.6
	Not applicable (not traveling to appointment)	32	7.4	12.2	97.7
	Don't know/can't remember	6	1.4	2.3	100.0
	Total	263	60.6	100.0	
Missing	System	171	39.4		
Total		434	100.0		

**The next several questions will deal with the various aspects of the driver's help or aid to you on your trip. Did the driver of this trip you took on [Q2] from [Q3] to [Q4] get out of the vehicle and announce himself/herself to you at your door?**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	169	38.9	64.8	64.8
	No	61	14.1	23.4	88.1
	Don't know/don't remember	31	7.1	11.9	100.0
	Total	261	60.1	100.0	
Missing	System	173	39.9		
Total		434	100.0		

**Were you waiting outside or at the curb when the driver arrived?**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	44	10.1	71.0	71.0
	No	16	3.7	25.8	96.8
	Don't know/don't remember	2	0.5	3.2	100.0
	Total	62	14.3	100.0	
Missing	System	372	85.7		
Total		434	100.0		

**Did you need the driver's help in getting to or from the door, or getting in or out of the vehicle?**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes (on at least part of the trip)	119	27.4	45.9	45.9
	No	132	30.4	51.0	96.9
	Don't know/don't remember	8	1.8	3.1	100.0
	Total	259	59.7	100.0	
Missing	System	175	40.3		
Total		434	100.0		

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# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### Did the driver actually help you?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes (on at least part of the trip)	111	25.6	94.1	94.1
	No (did not help)	5	1.2	4.2	98.3
	Don't know/don't remember	2	0.5	1.7	100.0
	Total	118	27.2	100.0	
Missing	System	316	72.8		
Total		434	100.0		

#### a. Comfort of the ride

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	118	27.2	46.5	46.5
	Good	106	24.4	41.7	88.2
	Only Fair	20	4.6	7.9	96.1
	Poor	3	0.7	1.2	97.2
	Don't know/refused	7	1.6	2.8	100.0
	Total	254	58.5	100.0	
Missing	System	180	41.5		
Total		434	100.0		

#### b. Overall condition of the vehicle

**INTERVIEWER NOTE:** Overall condition of the vehicle includes things like general upkeep, appearance of vehicle, cleanliness of vehicle, etc.

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	147	33.9	57.6	57.6
	Good	96	22.1	37.6	95.3
	Only Fair	5	1.2	2.0	97.3
	Don't know/refused	7	1.6	2.7	100.0
	Total	255	58.8	100.0	
Missing	System	179	41.2		
Total		434	100.0		

#### c. Courtesy of the driver

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	197	45.4	77.9	77.9
	Good	47	10.8	18.6	96.4
	Only Fair	5	1.2	2.0	98.4
	Poor	1	0.2	0.4	98.8
	Don't know/refused	3	0.7	1.2	100.0
	Total	253	58.3	100.0	
Missing	System	181	41.7		
Total		434	100.0		

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## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

#### d. Driving skills of the driver

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	165	38.0	65.2	65.2
	Good	74	17.1	29.2	94.5
	Only Fair	2	0.5	0.8	95.3
	Poor	1	0.2	0.4	95.7
	Don't know/refused	11	2.5	4.3	100.0
	Total	253	58.3	100.0	
Missing	System	181	41.7		
Total		434	100.0		

#### e. Condition and ease of use in the seatbelts

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	127	29.3	50.0	50.0
	Good	95	21.9	37.4	87.4
	Only Fair	15	3.5	5.9	93.3
	Poor	5	1.2	2.0	95.3
	Don't know/refused	9	2.1	3.5	98.8
	Not applicable	3	0.7	1.2	100.0
	Total	254	58.5	100.0	
Missing	System	180	41.5		
Total		434	100.0		

#### f. The driver's skill and care in tying down your wheelchair or scooter. INTERVIEWER

**NOTE: Only ask of wheelchair/scooter riders. CUSTOMER MOBILITY AID: [Q6]**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	92	21.2	37.2	37.2
	Good	35	8.1	14.2	51.4
	Don't know/refused	1	0.2	0.4	51.8
	Not applicable	119	27.4	48.2	100.0
Total	247	56.9	100.0		
Missing	System	187	43.1		
Total		434	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

**What was the purpose of this trip on [Q2]?DO  
NOT READ LIST. ACCEPT SINGLE  
RESPONSE.IF RESPONDENT SAYS  
"RETURNING HOME," PROBE: What was the  
purpose of the trip you were returning from?**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Other (please specify)	11	2.5	4.1	4.1
	Medical appointment (other than dialysis or rehabilitation).	91	21.0	34.2	38.3
	Dialysis	6	1.4	2.3	40.6
	Physical therapy/rehabilitation	11	2.5	4.1	44.7
	Visiting/recreation/social/out for a meal	26	6.0	9.8	54.5
	Errands (grocery shopping, bank, drug store, hair appointments)	56	12.9	21.1	75.6
	Employment	13	3.0	4.9	80.5
	Senior center program	6	1.4	2.3	82.7
	Church/temple	15	3.5	5.6	88.3
	Civic purpose or meeting/committee meeting	2	0.5	0.8	89.1
	Volunteer	4	0.9	1.5	90.6
	Adult day program	5	1.2	1.9	92.5
	School/college/vocational training	9	2.1	3.4	95.9
	Don't know/refused	11	2.5	4.1	100.0
	Total	266	61.3	100.0	
Missing	System	168	38.7		
Total		434	100.0		

#### Other (please specify)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		423	97.5	97.5	97.5
	Art program.	1	0.2	0.2	97.7
	Court.	1	0.2	0.2	97.9
	Death in the family.	1	0.2	0.2	98.2
	DMV.	1	0.2	0.2	98.4
	Fitness center.	1	0.2	0.2	98.6
	Return home.	2	0.5	0.5	99.1
	Train Station.	3	0.7	0.7	99.8
	Visit Farmers Market.	1	0.2	0.2	100.0
	Total	434	100.0	100.0	



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

This next question is more general in nature, not just related to the specific trip we have been discussing. In the past month, did you call Dial-A-Lift for information or customer service (e.g., for any reason other than to make a reservation)?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	37	8.5	14.1	14.1
	No	219	50.5	83.3	97.3
	Don't know	7	1.6	2.7	100.0
	Total	263	60.6	100.0	
Missing	System	171	39.4		
Total		434	100.0		

What was the main purpose of your most recent call?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Other (please specify)	2	0.5	5.0	5.0
	No show or cancellation issues	6	1.4	15.0	20.0
	Question related to a ride you were taking (i.e., Where's my	11	2.5	27.5	47.5
	Change reservation (pick up, drop off, date, or time)	3	0.7	7.5	55.0
	Request information	8	1.8	20.0	75.0
	Complaint	1	0.2	2.5	77.5
	Request a pass	1	0.2	2.5	80.0
	Confirm a previous reservation	4	0.9	10.0	90.0
	Application/eligibility	1	0.2	2.5	92.5
	Change address	2	0.5	5.0	97.5
	Can't remember/refused	1	0.2	2.5	100.0
	Total	40	9.2	100.0	
Missing	System	394	90.8		
Total		434	100.0		

Other (please specify)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		432	99.5	99.5	99.5
	Called Dial-A-Lift to speak to Emily Burkamp about expanding its service area.	1	0.2	0.2	99.8
	Wanted transportation.	1	0.2	0.2	100.0
	Total	434	100.0	100.0	



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

#### Length of time on hold before speaking to a customer service agent

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	13	3.0	35.1	35.1
	Good	19	4.4	51.4	86.5
	Only Fair	3	0.7	8.1	94.6
	Don't know/refused	1	0.2	2.7	97.3
	Not applicable (didn't have to hold)	1	0.2	2.7	100.0
	Total	37	8.5	100.0	
Missing	System	397	91.5		
Total		434	100.0		

#### The length of time it took to finish the entire call

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	27	6.2	71.1	71.1
	Good	10	2.3	26.3	97.4
	Not applicable (didn't have to hold)	1	0.2	2.6	100.0
	Total	38	8.8	100.0	
Missing	System	396	91.2		
Total		434	100.0		

#### The courtesy of the customer service agent

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	27	6.2	73.0	73.0
	Good	8	1.8	21.6	94.6
	Poor	1	0.2	2.7	97.3
	Not applicable (didn't have to hold)	1	0.2	2.7	100.0
	Total	37	8.5	100.0	
Missing	System	397	91.5		
Total		434	100.0		

#### The skill of the customer service agent in handling your question or dealing with your problem

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Excellent	28	6.5	75.7	75.7
	Good	6	1.4	16.2	91.9
	Poor	1	0.2	2.7	94.6
	Don't know/refused	1	0.2	2.7	97.3
	Not applicable (didn't have to hold)	1	0.2	2.7	100.0
	Total	37	8.5	100.0	
Missing	System	397	91.5		
Total		434	100.0		

C-16

# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

**What is the main reason you don't ride Dial-A-Lift more often? Any other reasons? DO NOT READ RESPONSES.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Other (please specify)	50	11.5	20.1	20.1
	Have other transportation/use as a backup	38	8.8	15.3	35.3
	Only use for doctor's appointments	28	6.5	11.2	46.6
	Don't travel much/unable to travel	77	17.7	30.9	77.5
	Other transportation easier/more convenient/comfortable/fast	38	8.8	15.3	92.8
	Cost/can't afford to travel	3	0.7	1.2	94.0
	Travel outside DAL service area	2	0.5	0.8	94.8
	Disability no longer requires DAL	4	0.9	1.6	96.4
	Not taking trips where used DAL	1	0.2	0.4	96.8
	Want to save it for those who need it	2	0.5	0.8	97.6
	Bad experience with DAL	6	1.4	2.4	100.0
	Total	249	57.4	100.0	
Missing	System	185	42.6		
Total		434	100.0		

#### Other (please specify)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		384	88.5	88.5	88.5
	Dial-A-Lift is not available at times we would like to take it.	1	0.2	0.2	88.7
	I forget to make the appointment on a regular basis.	1	0.2	0.2	88.9
	I only have a conditional pass for the winter/spring months.	1	0.2	0.2	89.2
	Insufficient vehicles in Yelm.	1	0.2	0.2	89.4
	Lack of flexible scheduling on Sundays.	1	0.2	0.2	89.6
	MAIN TRANSPORTATION	1	0.2	0.2	89.9
	Must schedule too far in advance.	1	0.2	0.2	90.1
	Need care giver for spouse.	1	0.2	0.2	90.3
	No additional need.	25	5.8	5.8	96.1
	Personal vehicle available in the day.	1	0.2	0.2	96.3
	Restricted access of to two destinations due to weight of groceries.	1	0.2	0.2	96.5
	Schedule conflict with employer.	3	0.7	0.7	97.2
	Service area.	3	0.7	0.7	97.9
	Timing issues.	4	0.9	0.9	98.8
	Too limited a time frame in which I can make reservations. Effectively, I only have a three day window. I usually can not make a reservation for the next two days, as all spaces are full. This means that I need to call 3 times a week, just to schedule a one week time block. The process for setting up a repeating ride is also cumbersome.	1	0.2	0.2	99.1
	Two-day window to get the service and not knowing when I am going somewhere.	1	0.2	0.2	99.3

C-17

## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

Wait time are way too long, sometimes forget appointment cause of blindness.	1	0.2	0.2	99.5
Wait time too long.	1	0.2	0.2	99.8
Want to schedule further in advance.	1	0.2	0.2	100.0
Total	434	100.0	100.0	

**The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid A mobility impairment - whether you use a wheelchair or can	141	32.5	100.0	100.0
Missing System	293	67.5		
Total	434	100.0		

**The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid A developmental disability or cognitive/mental impairment (i	59	13.6	100.0	100.0
Missing System	375	86.4		
Total	434	100.0		

**The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Frailty or a problem with energy (if asked for examples say,	48	11.1	100.0	100.0
Missing System	386	88.9		
Total	434	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Blindness or low vision	52	12.0	100.0	100.0
Missing	System	382	88.0		
Total		434	100.0		

The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Hearing impairment	4	0.9	100.0	100.0
Missing	System	430	99.1		
Total		434	100.0		

The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Refused (DO NOT READ)	5	1.2	100.0	100.0
Missing	System	429	98.8		
Total		434	100.0		

The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Other (please specify) (DO NOT READ)	28	6.5	100.0	100.0
Missing	System	406	93.5		
Total		434	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### Other (please specify) (DO NOT READ)

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	407	93.8	93.8	93.8
ADHD.	1	0.2	0.2	94.0
Balance issue.	1	0.2	0.2	94.2
Can't drive anymore.	1	0.2	0.2	94.5
Can't ride the bus.	1	0.2	0.2	94.7
Cancer and chemotherapy.	1	0.2	0.2	94.9
Cancer chemotherapy caused neuropathy in my toes which makes it very difficult to walk.	1	0.2	0.2	95.2
Closest bus.	1	0.2	0.2	95.4
Diabetes.	1	0.2	0.2	95.6
Don't feel comfortable walking more than a block	1	0.2	0.2	95.9
Don't feel like walking.	1	0.2	0.2	96.1
Fall down a lot.	1	0.2	0.2	96.3
Grossly overweight.	1	0.2	0.2	96.5
Had cancer, and bus service only operate on Tuesday and Thursdays.	1	0.2	0.2	96.8
I have back issues---some days I feel I could walk quite a distance, other days I cannot. For example, Friday October 16th; I needed to walk from Curves to where I live and was experiencing pain in my let hip. Truthfully I didn't think I was going to be able to make it. There was a place where I could sit down for which I was thankful. As a person gets older there are limitations on their abilities to do things. I am finding for myself that it is walking.	1	0.2	0.2	97.0
Knee replacement.	1	0.2	0.2	97.2
Leg problem.	2	0.5	0.5	97.7
Lose balance.	1	0.2	0.2	97.9
Neck and arm problems.	1	0.2	0.2	98.2
No disabling conditions.	1	0.2	0.2	98.4
Panic disorder.	1	0.2	0.2	98.6
Seizures.	1	0.2	0.2	98.8
Sometimes don't know where going.	1	0.2	0.2	99.1
The reg bus is a mile away which is bad for her knees.	1	0.2	0.2	99.3
Trouble getting into any vehicle.	1	0.2	0.2	99.5
Unable to get on the bus.	1	0.2	0.2	99.8
Unsure	1	0.2	0.2	100.0
Total	434	100.0	100.0	



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

**IF MORE THAN ONE DISABILITY IN THE PREVIOUS QUESTION, ASK: What would you say is the main disability or disabling condition that causes you to use Dial-A-Lift?**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Other (please specify) (DO NOT READ)	20	4.6	15.4	15.4
	A mobility impairment - whether you use a wheelchair or can	46	10.6	35.4	50.8
	A developmental disability or cognitive/mental impairment (i	23	5.3	17.7	68.5
	Frailty or a problem with energy (if asked for examples say	15	3.5	11.5	80.0
	Blindness or low vision	20	4.6	15.4	95.4
	Hearing impairment	1	0.2	0.8	96.2
	Refused (DO NOT READ)	5	1.2	3.8	100.0
	Total	130	30.0	100.0	
Missing	System	304	70.0		
Total		434	100.0		

#### Other (please specify) (DO NOT READ)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		417	96.1	96.1	96.1
	Back problem.	1	0.2	0.2	96.3
	Can't walk up step.	1	0.2	0.2	96.5
	Can't walk very far.	1	0.2	0.2	96.8
	Can't walk.	1	0.2	0.2	97.0
	Cancer and chemotherapy.	1	0.2	0.2	97.2
	Cant be out too long in the cold.	1	0.2	0.2	97.5
	Diabetic.	1	0.2	0.2	97.7
	Disability.	1	0.2	0.2	97.9
	Grossly overweight.	1	0.2	0.2	98.2
	Hard to use other bus.	1	0.2	0.2	98.4
	Joint replacement.	1	0.2	0.2	98.6
	Lower back problem.	1	0.2	0.2	98.8
	Neck and back injury.	1	0.2	0.2	99.1
	No vehicle.	1	0.2	0.2	99.3
	Several medical problems.	1	0.2	0.2	99.5
	TBI	1	0.2	0.2	99.8
	Unable to walk.	1	0.2	0.2	100.0
	Total	434	100.0	100.0	

# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

**Which of the following categories best describes your race or ethnic identification?  
READ LIST. ACCEPT MULTIPLE RESPONSES.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	White	214	49.3	100.0	100.0
Missing	System	220	50.7		
Total		434	100.0		

**Which of the following categories best describes your race or ethnic identification?  
READ LIST. ACCEPT MULTIPLE RESPONSES.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Hispanic or Latino	10	2.3	100.0	100.0
Missing	System	424	97.7		
Total		434	100.0		

**Which of the following categories best describes your race or ethnic identification?  
READ LIST. ACCEPT MULTIPLE RESPONSES.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Asian	2	0.5	100.0	100.0
Missing	System	432	99.5		
Total		434	100.0		

**Which of the following categories best describes your race or ethnic identification?  
READ LIST. ACCEPT MULTIPLE RESPONSES.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Native American or Alaska Native	10	2.3	100.0	100.0
Missing	System	424	97.7		
Total		434	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

**Which of the following categories best describes your race or ethnic identification? READ LIST. ACCEPT MULTIPLE RESPONSES.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Black or African American	11	2.5	100.0	100.0
Missing	System	423	97.5		
Total		434	100.0		

**Which of the following categories best describes your race or ethnic identification? READ LIST. ACCEPT MULTIPLE RESPONSES.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Native Hawaiian or other Pacific Islander	1	0.2	100.0	100.0
Missing	System	433	99.8		
Total		434	100.0		

**Which of the following categories best describes your race or ethnic identification? READ LIST. ACCEPT MULTIPLE RESPONSES.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Refused (DO NOT READ)	12	2.8	100.0	100.0
Missing	System	422	97.2		
Total		434	100.0		

**Which of the following categories best describes your race or ethnic identification? READ LIST. ACCEPT MULTIPLE RESPONSES.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Other (please specify)	3	0.7	100.0	100.0
Missing	System	431	99.3		
Total		434	100.0		

**Other (please specify)**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	American citizen of European descent.	431	99.3	99.3	99.3
	Filipino and Indian.	1	0.2	0.2	99.5
	Latina-otherwise unspecified.	1	0.2	0.2	99.8
Total		434	100.0	100.0	100.0





## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

#### What is your total annual household income? READ LIST IF NECESSARY.

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Under \$7,500	23	5.3	9.5	9.5
	\$7,500 to \$14,999	43	9.9	17.8	27.3
	\$15,000 to \$24,999	37	8.5	15.3	42.6
	\$25,000 to \$49,999	39	9.0	16.1	58.7
	\$50,000 to \$74,999	10	2.3	4.1	62.8
	\$75,000 to \$99,999	4	0.9	1.7	64.5
	\$100,000 to \$149,999	3	0.7	1.2	65.7
	\$150,000 to \$199,999	2	0.5	0.8	66.5
	Refused (DO NOT READ)	33	7.6	13.6	80.2
	Don't know (DO NOT READ)	48	11.1	19.8	100.0
	Total	242	55.8	100.0	
Missing	System	192	44.2		
Total		434	100.0		

#### How do you usually pay for your trips on Dial-A-Lift? (READ LIST)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Other (please specify)	16	3.7	6.5	6.5
	Purchase daily, monthly, or yearly pass from Customer Service	87	20.0	35.5	42.0
	Purchase pass from driver	8	1.8	3.3	45.3
	Pay cash	121	27.9	49.4	94.7
	Receive monthly pass through social service agency	1	0.2	0.4	95.1
	State Star Pass	6	1.4	2.4	97.6
	Don't know (DO NOT READ)	4	0.9	1.6	99.2
	Never pay for trips on DAL/Didn't know I had to pay (DO NOT READ)	2	0.5	0.8	100.0
	Total	245	56.5	100.0	
	Missing	System	189	43.5	
Total		434	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### Other (please specify)

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	419	96.5	96.5	96.5
Apartment building I live in provides them.	1	0.2	0.2	96.8
Book of pre-paid tickets.	1	0.2	0.2	97.0
Bus pass.	1	0.2	0.2	97.2
Christmas Gift.	1	0.2	0.2	97.5
City Hall.	2	0.5	0.5	97.9
City of Olympia supplies his transit pass.	1	0.2	0.2	98.2
Credit card.	1	0.2	0.2	98.4
Goes to her credit card.	1	0.2	0.2	98.6
Pay monthly.	1	0.2	0.2	98.8
Ralph's Thriftway.	1	0.2	0.2	99.1
Reduced Permit.	1	0.2	0.2	99.3
Thriftway on Fourth Avenue, and somewhere over by Lacey (a little store sells bus passes-don't remember name of it), too.	1	0.2	0.2	99.5
Thriftway.	1	0.2	0.2	99.8
Used to pay with cash but now have a student ID.	1	0.2	0.2	100.0
Total	434	100.0	100.0	

**Do you currently have a Reduced Fare Permit?**  
**INTERVIEWER NOTE: Reduced fares only apply to monthly passes on Dial-A-Lift.**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	93	21.4	78.8	78.8
Yes	19	4.4	16.1	94.9
No	6	1.4	5.1	100.0
Don't know	118	27.2	100.0	
Total	316	72.8		
Missing	434	100.0		
System				
Total				

**Have you ridden on regular public transit since you have been disabled (in your adult life)? (Regular public transit examples: bus systems such as Intercity Transit, Pierce Transit, Sound Transit, or other similar systems)**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	102	23.5	41.5	41.5
Yes	142	32.7	57.7	99.2
No	2	0.5	0.8	100.0
Refused	246	56.7	100.0	
Total	188	43.3		
Missing	434	100.0		
System				
Total				



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### Have you used regular public transit in the past month?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	55	12.7	53.9	53.9
	No	46	10.6	45.1	99.0
	Don't know/refused	1	0.2	1.0	100.0
	Total	102	23.5	100.0	
Missing	System	332	76.5		
Total		434	100.0		

#### Medicaid transportation services

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	10	2.3	4.1	4.1
	No	232	53.5	95.1	99.2
	Don't know	2	0.5	0.8	100.0
	Total	244	56.2	100.0	
Missing	System	190	43.8		
Total		434	100.0		



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

#### Veteran's transportation service

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	0.2	0.4	0.4
	No	241	55.5	98.8	99.2
	Don't know	2	0.5	0.8	100.0
	Total	244	56.2	100.0	
Missing	System	190	43.8		
Total		434	100.0		

#### Senior Center van/shuttle

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	9	2.1	3.7	3.7
	No	233	53.7	95.9	99.6
	Don't know	1	0.2	0.4	100.0
	Total	243	56.0	100.0	
Missing	System	191	44.0		
Total		434	100.0		

#### Taxi

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	32	7.4	13.1	13.1
	No	212	48.8	86.5	99.6
	Don't know	1	0.2	0.4	100.0
	Total	245	56.5	100.0	
Missing	System	189	43.5		
Total		434	100.0		

#### Have you driven yourself in a car in the past month?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	21	4.8	8.6	8.6
	No	224	51.6	91.4	100.0
	Total	245	56.5	100.0	
Missing	System	189	43.5		
Total		434	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### Have you ridden in a car with others in the past month?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	194	44.7	79.2	79.2
	No	50	11.5	20.4	99.6
	Don't know/can't remember	1	0.2	0.4	100.0
	Total	245	56.5	100.0	
Missing	System	189	43.5		
Total		434	100.0		

**Do you have any other comments about Dial-A-Lift service, that is to say, anything that you would like to tell us about your experiences with Dial-A-Lift? PROBE: Anything else? INTERVIEWER NOTE: If a serious issue is mentioned, especially a safety or security issue, please indicate the location of the incident.**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	200	46.1	46.1	46.1
30 minute window is excessive.	1	0.2	0.2	46.3
A blessing. Without them, we would be home-bounded.	1	0.2	0.2	46.5
All is well and appreciate the service.	1	0.2	0.2	46.8
All positive. One driver was a bit weird, but they were on time, pleasant. Nothing negative to say about Dial-A-Lift, but it is not for people that do not schedule their times.	1	0.2	0.2	47.0
Better than the other State Services. I would connections with another public transit.	1	0.2	0.2	47.2
Could not live without Dial-A-Lift.	1	0.2	0.2	47.5
A very good service.	1	0.2	0.2	47.7
Would like to be able to pay by credit/debit machine.	1	0.2	0.2	47.9
Very satisfied with the service.	1	0.2	0.2	48.2
For the most part, my experience with Dial-A-Lift is good.	1	0.2	0.2	48.4
Excellent service.	1	0.2	0.2	48.6
An excellent service in every way.	1	0.2	0.2	48.8
Very happy over all with the services of Dial-A-Lift.	1	0.2	0.2	49.1
Very satisfied.	1	0.2	0.2	49.3
Customer states that she is very satisfied with the services	1	0.2	0.2	49.5
I worry that I would miss the Dial-A-Lift van if it came too early.	1	0.2	0.2	49.8



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

I would prefer the SUV which saves more gas.	1	0.2	0.2	50.0
The services are great.	1	0.2	0.2	50.2
Customer wants to know how to prevent from a driver from leaving from appt. when customer is not ready.	1	0.2	0.2	50.5
The wait time is too long between trips.	1	0.2	0.2	50.7
Dial-A-Lift can no longer accommodate me to go to my place of employment, due to the changes concerning the disabled.	1	0.2	0.2	50.9
Dial-A-Lift is an excellent service and we love it!	1	0.2	0.2	51.2
Dial-A-Lift is exceptional, given what they have to deal with.	1	0.2	0.2	51.4
Dial A List is a great service.	1	0.2	0.2	51.6
Driver comes too early.	1	0.2	0.2	51.8
Driver needs to be more on time with pick up, was late for next appointment.	1	0.2	0.2	52.1
Drivers are excellent, friendly and we're lucky to have them. Blessed to have Dial-A-Lift.	1	0.2	0.2	52.3
Drivers are really helpful.	1	0.2	0.2	52.5
Excellent service and I'm really thankful for it.	1	0.2	0.2	52.8
Excellent service and they really helped me. Haven't used it so much due to my improving condition, but it is very good.	1	0.2	0.2	53.0
Excellent service and very good.	1	0.2	0.2	53.2
Excellent service and very helpful especially after last year.	1	0.2	0.2	53.5
Excellent service for my first time use with good values.	1	0.2	0.2	53.7
Fairly good, drivers are very nice to passengers (introducing themselves at the door, etc.). Would recommend Dial-A-Lift transit.	1	0.2	0.2	53.9
Feel lucky to have Dial-A-Lift.	1	0.2	0.2	54.1
Fine service.	1	0.2	0.2	54.4
Generally appreciate it, but there are not enough buses when I need them.	1	0.2	0.2	54.6
God bless Dial-A-Lift people!	1	0.2	0.2	54.8
Good service.	1	0.2	0.2	55.1



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

Good service.	1	0.2	0.2	55.3
Grateful for Dial-A-Lift.	1	0.2	0.2	55.5
Grateful for Dial-A-Lift. I don't know what I would do without it.	1	0.2	0.2	55.8
Great service, we appreciate it!	1	0.2	0.2	56.0
I've been pleased with the service.	1	0.2	0.2	56.2
I've had some bad experiences with Dial-A-Lift.	1	0.2	0.2	56.5
I am a firm believer in the buses and I do not know what I would do without them.	1	0.2	0.2	56.7
I am a very satisfied customer and very grateful for this service.	1	0.2	0.2	56.9
I am completely satisfied and very fortunate to have Dial-A-Lift in our area.	1	0.2	0.2	57.1
I am extremely grateful for Dial-A-Lift and would not be able to get to my doctor's appointment.	1	0.2	0.2	57.4
I am glad it is available.	1	0.2	0.2	57.6
I am grateful for Dial-A-Lift. They are like my service dog; they are good to me.	1	0.2	0.2	57.8
I am impressed with Dial-A-Lift; it is very accommodating. I wish you could schedule appointments further ahead of time since I have a tendency to forget.	1	0.2	0.2	58.1
I am learning the system since we just moved to the area. The caller stated that the window to schedule a bus ride 5 days out is sometimes difficult to work around.	1	0.2	0.2	58.3
I am satisfied with the service!	1	0.2	0.2	58.5
I am thankful for the service. I wish Dial-A-Lift would expand its services to Campus Glen and Willamette.	1	0.2	0.2	58.8
I am very happy with it.	1	0.2	0.2	59.0
I am very happy with the service and I am grateful that they have the service.	1	0.2	0.2	59.2
I am very pleased with the service!	1	0.2	0.2	59.4
I am very satisfied with the service and it is a wonderful service for people like me.	1	0.2	0.2	59.7
I appreciate having it and would not get out much if it were not for Dial-A-Lift.	1	0.2	0.2	59.9



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

I appreciate that they are there.	1	0.2	0.2	60.1
I appreciate their service and it was not for family and neighbors I would be using them more. I expect to be using Dial-A-Lift more in the future.	1	0.2	0.2	60.4
I appreciate you are here for us and keep up the good work!	1	0.2	0.2	60.6
I believe it is the policy for the driver to come to the door; I didn't hear the door bell and then noticed that the Dial-A-Lift was there. The driver told me he had called in a 'no show'; I was taken to my destination and was told that ""you would see that I had gotten dropped off and would be picked up."" I called after waiting for quite some time after I was finished and well after the half hour pick up window and was told that the ride had been cancelled (I don't remember that part now) this was quite some time ago. I think it is important for the driver to come to the door, ring the door bell or knock loudly if necessary. No need to call. I do know that a person is only allowed so many 'no shows' and then you can't ride for a while, I believe. I am very grateful for this service. Helps me to get where I need to. I do ask folks I know for help to get errands taken care of; but it is nice to have this service. I do wish that those who answer the phone and the drivers would tell their name. I am sure these folks receive many phone calls or see many folks in a day but if you put on a smile before you pick up the phone or as the person gets on the van be friendly---you never know what impact you may have on a person's day. Thank you all for helping those of us who don't have any way to get where we need to go to get there.	1	0.2	0.2	60.8
I cannot even find the words to express how grateful how I am for Dial-A-Lift.	1	0.2	0.2	61.1
I don't know what I would do without it	1	0.2	0.2	61.3
I don't like the fact that if I miss the bus there's no one else to call	1	0.2	0.2	61.5
I enjoy the service.	1	0.2	0.2	61.8





# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

I find every driver to be very friendly and helpful and had some experiences waiting a bit late for buses. However, I am very thankful for Dial-A-Lift.	1	0.2	0.2	62.0
I have anxiety attacks on Saturday night because I am worried about whether I will be picked up on Sunday to make church. Please pick me up at 8:00 am and I will be very happy! She has been late to church on several occasions, and she misses the singing!!!!!!	1	0.2	0.2	62.2
I have had very good experiences with Dial-A-Lift.	1	0.2	0.2	62.4
I just want to say the here is excellent and professional	1	0.2	0.2	62.7
I like dial-a-lift its good service	1	0.2	0.2	62.9
I like it and use it when I need it.	1	0.2	0.2	63.1
I like the service and like to referred my elderly neighborhood people	1	0.2	0.2	63.4
I love Dial-A-Lift, the people who work there. They are good people and provide a good service. Without them, I would not be able to go anywhere.	1	0.2	0.2	63.6
I love it!	1	0.2	0.2	63.8
I love this service, have not met a bad driver everyone is nice and and kind.	1	0.2	0.2	64.1
I really appreciate it, otherwise I would be stuck.	1	0.2	0.2	64.3
I really enjoy their service: kind, helpful and friendly. It is very courteous and I really appreciate it.	1	0.2	0.2	64.5
I think Dial-A-Lift bus drivers should have to wait more than five minutes in the window time for passengers if they are not at the stop instead of just leaving after five minutes. It is a bumpy ride and there seems to be no shocks on the bus.	1	0.2	0.2	64.7
I think it is a great service. I would like more direct routes. I would like to get to my destination on time rather than extremely early.	1	0.2	0.2	65.0
I think it is a wonderful service and the drivers have been courteous.	1	0.2	0.2	65.2



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

I think it is a wonderful service!	1	0.2	0.2	65.4
I think it is great.	1	0.2	0.2	65.7
I think it's a very valuable service	1	0.2	0.2	65.9
I think that the drivers are very kind	1	0.2	0.2	66.1
I think they are a wonderful organization and I can go to the senior center. They have always been there for me.	1	0.2	0.2	66.4
I think they are an excellent service and I appreciate it when I do not have anyone to take me where I need to go.	1	0.2	0.2	66.6
I think they are terrific!	1	0.2	0.2	66.8
I think they are very sufficient and helpful.	1	0.2	0.2	67.1
I think they do a good job.	1	0.2	0.2	67.3
I think we are lucky to have it, and the waiting time is too long.	1	0.2	0.2	67.5
I wait for pick-ups up to an hour-and-a-half. I do not like that.	1	0.2	0.2	67.7
I wish it ran on Thanksgiving!	1	0.2	0.2	68.0
I wish the window was smaller since we get to the destination too early. I hope there is never another incident when the Dial-A-Lift leaves without him. Thank God for Intercity transit and Dial-A-Lift!	1	0.2	0.2	68.2
I wish you guys were nationwide. Kansas has nothing like Dial-A-Lift.	1	0.2	0.2	68.4
I would like Dial-A-Lift to bring back standing reservations since I forget to book trips. Could they extend services on Sunday until 11 pm? Thank you!	1	0.2	0.2	68.7
I'd like the same-day ride instead of calling five-day schedule.	1	0.2	0.2	68.9
Improve timing issues and the bus needs to leave 5 minutes after the scheduled time period.	1	0.2	0.2	69.1
In the last six months, there was a "snotty" Dial-A-Lift driver and she was not helpful at all. I called to complain about her already, though. Other than that we really appreciate it.	1	0.2	0.2	69.4



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

It has worked out really well for him. Most of the drivers are accommodating and friendly. The drivers get there on time and I've never been late for an appointment.	1	0.2	0.2	69.6
It is a good service! Thank you!	1	0.2	0.2	69.8
It is a good service. It should be easier to schedule regular pick-ups. I tried to book on-line because I was on hold too long. It was never scheduled.	1	0.2	0.2	70.0
It is a great service. The cost is good. It is hard to schedule in advance though. The window around pick-up and delivery takes too long and I have to wait.	1	0.2	0.2	70.3
It is a wonderful service and the drivers are happy and helpful.	1	0.2	0.2	70.5
It is a wonderful service, and I tell everyone it is, too!	1	0.2	0.2	70.7
It is a wonderful service. The drivers are courteous and great people!	1	0.2	0.2	71.0
It is an awesome service and has the best price in town.	1	0.2	0.2	71.2
It is an excellent service and I am very fortunate to have that available to me.	1	0.2	0.2	71.4
It is wonderful and she swears by it. She gets to go one place on her own.	1	0.2	0.2	71.7
It was really great.	1	0.2	0.2	71.9
It would be nice to get something in the mail to explain my pass and how Dial-A-Lift operates.	1	0.2	0.2	72.1
It's a wonderful service and thankful	1	0.2	0.2	72.4
It's been super.	1	0.2	0.2	72.6
It's on the positive side. I am really impressed how they organize and schedule things.	1	0.2	0.2	72.8
Keep up the good work.	1	0.2	0.2	73.0
I like everyone a lot.	1	0.2	0.2	73.3
Love the drivers, the service, and the fact that it is affordable. It is like a lifeline for me, since without Dial-A-Lift, I would be stuck at home.	1	0.2	0.2	73.5



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

Make the bus stops safer. Can't make it to my destination on time due to timing issues.	1	0.2	0.2	73.7
Marvelous service and appreciate everything they done for us. Feel very safe with them. Survey was taken on behalf of the passenger by a friend/spouse.	1	0.2	0.2	74.0
My experience has been great!!	1	0.2	0.2	74.2
My experience with Dial-A-Lift is incredible and is more in tune with what the world needs. I cannot think of enough praise for Dial-A-Lift.	1	0.2	0.2	74.4
NA	5	1.2	1.2	75.6
NA.	2	0.5	0.5	76.0
NA. The survey was taken on behalf of the customer by her parent/guardian.	1	0.2	0.2	76.3
No.	1	0.2	0.2	76.5
No.	10	2.3	2.3	78.8
No.	5	1.2	1.2	80.0
No comment.	10	2.3	2.3	82.3
No comments.	17	3.9	3.9	86.2
No.	1	0.2	0.2	86.4
No, we really appreciate Dial-A-Lift.	1	0.2	0.2	86.6
No, we are very satisfied.	1	0.2	0.2	86.9
Not happy with the computer. It doesn't call me before time for my trip.	1	0.2	0.2	87.1
Not really.	1	0.2	0.2	87.3
Not really bad.	1	0.2	0.2	87.6
Overall happy with Dial-A-Lift and love their service. Look forward to them and very pleased.	1	0.2	0.2	87.8
Overall it is excellent. I would rather them use the bungee cord and not the net for securing my walker. The drivers are friendly and have been riding for twenty years and have not had a serious problem.	1	0.2	0.2	88.0
Picking up from a destination, sometimes the driver takes hours to pick him up.	1	0.2	0.2	88.2



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

Please expand your routes just a couple of blocks outside your range. Too much time to wait for the bus when going on two miles down the road. Try to provide better turnaround time.	1	0.2	0.2	88.5
Pleased with service, although I think you need more service.	1	0.2	0.2	88.7
Quite satisfied with them and the drivers are always friendly.	1	0.2	0.2	88.9
Really satisfied. The waiting is not bad.	1	0.2	0.2	89.2
Registered using the Web Tool, but when I press submit, it sends an error message and does not send you an email. Something is goofy with the user interface.	1	0.2	0.2	89.4
Satisfied with Dial-A-Lift. Like to see it expand.	1	0.2	0.2	89.6
Satisfied with Dial-A-Lift. Like to see it expand.	1	0.2	0.2	89.9
Schedule issues with Dial-A-Lift, need to revise the routes to make more sense and more rider-friendly, more vehicles on the road.	1	0.2	0.2	90.1
Scheduling issues on Saturdays. Other than that, pretty satisfied with good service.	1	0.2	0.2	90.3
Love it!	1	0.2	0.2	90.6
The drivers are always nice and always smiling.	1	0.2	0.2	90.8
Would like to pick up a little later on Sundays, over all the services are fantastic.	1	0.2	0.2	91.0
Sometimes I arrive too early at a destination (I take a book). Keep up the good work!	1	0.2	0.2	91.2
Sometimes, one scheduler asks you what time you would like to be picked up and this works for me. I do not like when the scheduler picks a time for you; I am too early for my appointments.	1	0.2	0.2	91.5
Sometimes, the bus drivers drive too fast on the freeway; I get nauseous. Also, on the lift, I fell in between the lift and the bus.	1	0.2	0.2	91.7
Terrible bungee cords for holding walker/canes. Reps mess up a lot of address info for rides.	1	0.2	0.2	91.9



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

Thankful for Dial-A-Lift.	1	0.2	0.2	92.2
Thankful for Dial-A-Lift. Passenger had safety issues with some drivers. Would like to speak to a representative regarding that, namely Emily Bergkamp.	1	0.2	0.2	92.4
Did not like the survey since it was hard to remember what happened on that particular day. Would like to see more flexibility in scheduling and more schedulers to take calls on Sunday since there is a long hold time of thirty minutes. Get some shocks for the vans!	1	0.2	0.2	92.6
Have to end the call. Mark everything excellent!	1	0.2	0.2	92.9
The drivers are excellent--friendly and helpful. The buses are nice and clean. The overall service is great!	1	0.2	0.2	93.1
The employees and bus drivers are sweet, but they need to work on their scheduling skills. Give us 6 days in advance, instead of the usual 5-day reservation period.	1	0.2	0.2	93.3
The management of Dial-A-Lift must be marvelous because each of their drivers are happy, helpful, and marvelous. I felt very honored to use Dial-A-Lift when needed. Thank you for your services.	1	0.2	0.2	93.5
The only real problem that I have is that when my errand is only 5 or 10 minutes, I still have to wait quite a while for the return trip. Many places don't have a waiting area or bench where I can wait for up to an hour for my ride back home. Consequently, I don't use the service for a number of errands where it's difficult to wait for an extended period for the return ride. If the drivers could wait for the 5 minutes, that would be helpful.	1	0.2	0.2	93.8
The passenger has witnessed discrimination issues concerning some of the drivers. Hang on to their good drivers.	1	0.2	0.2	94.0
The seat is bad.	1	0.2	0.2	94.2



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

The survey could use some fine tuning. (respondent was very sarcastic)	1	0.2	0.2	94.5
They are really good and friendly!	1	0.2	0.2	94.7
They are the most fantastic people I have ever ridden with and have been excellent to me.	1	0.2	0.2	94.9
They do a good job.	1	0.2	0.2	95.2
They do the best they can do, given with what they have to deal with.	1	0.2	0.2	95.4
They have been very helpful.	1	0.2	0.2	95.6
They treat me like family; it is a really nice service.	1	0.2	0.2	95.9
Treated me very well and I am very appreciative.	1	0.2	0.2	96.1
Useful services to have and very satisfied with services.	1	0.2	0.2	96.3
Very dissatisfied with the services. I cannot run errands because of how the rules for Dial-A-Lift are done. Dial-A-Lift needs to consider more about old people and their concerns.	1	0.2	0.2	96.5
Very friendly and helpful and I like the service.	1	0.2	0.2	96.8
Very good service and much needed.	1	0.2	0.2	97.0
Very good service for me.	1	0.2	0.2	97.2
Very good service. Use it more whenever I need it but it's hard to schedule arrangements for pick-up times.	1	0.2	0.2	97.5
Very good. However, he doesn't like how he has to call a couple of days in advance to set up a ride. Appointments are congested.	1	0.2	0.2	97.7
Very prompt, pleasant and helpful.	1	0.2	0.2	97.9
Very satisfied with Dial-A-Lift.	1	0.2	0.2	98.2
Very satisfied with the service Dial-A-Lift brings. The employees are very nice and friendly and could not ask more from them.	1	0.2	0.2	98.4
Well satisfied with the service and are lucky to have Dial-A-Lift.	1	0.2	0.2	98.6
Without Dial-A-Lift I wouldn't be able to do anything.	1	0.2	0.2	98.8
If we didn't have Dial-A-Lift it would be a hassle.	1	0.2	0.2	99.1



## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

They go above and beyond for me, and how patient they are.	1	0.2	0.2	99.3
You are incredible and a life saver! Our life would not be the same without it!	1	0.2	0.2	99.5
You guys give 110% out there.	1	0.2	0.2	99.8
You need to improve how notes can be left about particular location issues. Example: Many of your drivers do not know how to find the back door wheelchair access for the downtown YMCA. There is a particular way to get there that provides safety for the rider, and the driver. The information does not get relayed to each driver.	1	0.2	0.2	100.0
Total	434	100.0	100.0	





# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

**THANK RESPONDENTS FOR THEIR  
TIME. RECORD PASSENGER  
GENDER. (DO NOT READ).**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Female	305	70.3	73.5	73.5
	Male	106	24.4	25.5	99.0
	Uncertain	4	0.9	1.0	100.0
	Total	415	95.6	100.0	
Missing	System	19	4.4		
Total		434	100.0		

**INTERVIEW COMPLETED WITH:**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Passenger	263	60.6	100.0	100.0
Missing	System	171	39.4		
Total		434	100.0		

**INTERVIEW COMPLETED WITH:**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Attendant (translated to rider - passenger's opinions)	6	1.4	100.0	100.0
Missing	System	428	98.6		
Total		434	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

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#### INTERVIEW COMPLETED WITH:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Attendant (attendant was ON trip - attendant's opinions)	17	3.9	100.0	100.0
Missing	System	417	96.1		
Total		434	100.0		

#### INTERVIEW COMPLETED WITH:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Attendant (attendant was NOT on trip - attendant's opinions)	33	7.6	100.0	100.0
Missing	System	401	92.4		
Total		434	100.0		

#### INTERVIEW COMPLETED WITH:

		Frequency	Percent
Missing	System	434	100.0



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Appendix D

## **Non-Rider Survey Simple Frequencies**



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## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

#### Is customer willing to participate?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Customer is on line and able to respond	80	95.2	95.2	95.2
	Other assistance required	4	4.8	4.8	100.0
	Total	84	100.0	100.0	

#### Comments

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		83	98.8	98.8	98.8
	She is willing to participate but she has not been authorized to use the DAL service.	1	1.2	1.2	100.0
	Total	84	100.0	100.0	

#### Dial-A-Lift would very much like to have [Q1]'s opinions represented in the survey. Would you or another person at this number be able to assist her/him in responding to the survey questions?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes, attendant agrees to "translate" the survey for passenger	2	2.4	50.0	50.0
	Passenger has cognitive disability and is unable to respond	2	2.4	50.0	100.0
	Total	4	4.8	100.0	
Missing	System	80	95.2		
Total		84	100.0		

#### Even though you have not ridden Dial-A-Lift before, think of your experience with the program so far, including registration for the service. Which of the following best describes your rating of your overall experience with Dial-A-Lift? READ LIST

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very satisfied	47	56.0	56.0	56.0
	Somewhat satisfied	8	9.5	9.5	65.5
	Somewhat dissatisfied, or	6	7.1	7.1	72.6
	Very dissatisfied	7	8.3	8.3	81.0
	DO NOT READ: Don't know/refused	16	19.0	19.0	100.0
	Total	84	100.0	100.0	



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### What is the main reason you don't ride Dial-A-Lift? Any other reasons?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	2	2.4	2.4	2.4
24-hour notice is difficult	2	2.4	2.4	4.8
Allergic reactions	1	1.2	1.2	6.0
Difficulty scheduling trip	3	3.6	3.6	9.5
Disability	1	1.2	1.2	10.7
Hard to access service vehicles	1	1.2	1.2	11.9
Health issues	2	2.4	2.4	14.3
Lack of availability	2	2.4	2.4	16.7
No need	38	45.2	45.2	61.9
Not approved	5	6.0	6.0	67.9
Not registered	9	10.7	10.7	78.6
Out of service area	10	11.9	11.9	90.5
Requires a car seat for two year old	1	1.2	1.2	91.7
Temporary access	1	1.2	1.2	92.9
Too hard to move	1	1.2	1.2	94.0
Too ill	1	1.2	1.2	95.2
Too long of a wait period	3	3.6	3.6	98.8
Unable to access	1	1.2	1.2	100.0
Total	84	100.0	100.0	

The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid   A mobility impairment - whether you use a wheelchair or can	49	58.3	100.0	100.0
Missing   System	35	41.7		
Total	84	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	A developmental disability or cognitive/mental impairment (i	15	17.9	100.0	100.0
Missing	System	69	82.1		
Total		84	100.0		

The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Frailty or a problem with energy (if asked for examples say	13	15.5	100.0	100.0
Missing	System	71	84.5		
Total		84	100.0		

The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Blindness or low vision	9	10.7	100.0	100.0
Missing	System	75	89.3		
Total		84	100.0		

The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Hearing impairment	5	6.0	100.0	100.0
Missing	System	79	94.0		
Total		84	100.0		





## 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

### Intercity Transit

#### Final Report

The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Refused (DO NOT READ)	1	1.2	100.0	100.0
Missing System	83	98.8		
Total	84	100.0		

The next few questions are about you and your household. These questions will be used to verify that we've interviewed a representative cross-section of Dial-A-Lift riders. Can you please tell me what disability or disabling conditions are the main reasons

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Other (please specify) (DO NOT READ)	12	14.3	100.0	100.0
Missing System	72	85.7		
Total	84	100.0		

#### Other (please specify) (DO NOT READ)

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	72	85.7	85.7	85.7
Cancer	1	1.2	1.2	86.9
Diabetes	1	1.2	1.2	88.1
Disability	1	1.2	1.2	89.3
Health issues	5	6.0	6.0	95.2
Old age	1	1.2	1.2	96.4
Out of service area	2	2.4	2.4	98.8
Surgery	1	1.2	1.2	100.0
Total	84	100.0	100.0	



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

**IF MORE THAN ONE DISABILITY IN THE PREVIOUS QUESTION, ASK: What would you say is the main disability or disabling condition that causes you to use Dial-A-Lift?**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Other (please specify) (DO NOT READ)	4	4.8	12.1	12.1
	A mobility impairment - whether you use a wheelchair or can	13	15.5	39.4	51.5
	A developmental disability or cognitive/mental impairment (i	4	4.8	12.1	63.6
	Frailty or a problem with energy (if asked for examples say	5	6.0	15.2	78.8
	Blindness or low vision	4	4.8	12.1	90.9
	Hearing impairment	2	2.4	6.1	97.0
	Refused (DO NOT READ)	1	1.2	3.0	100.0
	Total	33	39.3	100.0	
Missing	System	51	60.7		
Total		84	100.0		

#### Other (please specify) (DO NOT READ)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		80	95.2	95.2	95.2
	Back Injury	1	1.2	1.2	96.4
	Must avoid sunlight	1	1.2	1.2	97.6
	Neuropathy	1	1.2	1.2	98.8
	Out of service area	1	1.2	1.2	100.0
	Total	84	100.0	100.0	

**Which of the following categories best describes your race or ethnic identification? READ LIST. ACCEPT MULTIPLE RESPONSES.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	White	66	78.6	100.0	100.0
Missing	System	18	21.4		
Total		84	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

**Which of the following categories best describes your race or ethnic identification? READ LIST.  
ACCEPT MULTIPLE RESPONSES.**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Hispanic or Latino	4	4.8	100.0	100.0
Missing System	80	95.2		
Total	84	100.0		

**Which of the following categories best describes your race or ethnic identification? READ LIST.  
ACCEPT MULTIPLE RESPONSES.**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Asian	1	1.2	100.0	100.0
Missing System	83	98.8		
Total	84	100.0		

**Which of the following categories best describes your race or ethnic identification? READ LIST.  
ACCEPT MULTIPLE RESPONSES.**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Native American or Alaska Native	4	4.8	100.0	100.0
Missing System	80	95.2		
Total	84	100.0		

**Which of the following categories best describes your race or ethnic identification? READ LIST. ACCEPT MULTIPLE RESPONSES.**

	Frequency	Percent
Missing System	84	100.0

**Which of the following categories best describes your race or ethnic identification? READ LIST.  
ACCEPT MULTIPLE RESPONSES.**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Native Hawaiian or other Pacific Islander	1	1.2	100.0	100.0
Missing System	83	98.8		
Total	84	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

**Which of the following categories best describes your race or ethnic identification? READ LIST.  
ACCEPT MULTIPLE RESPONSES.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Refused (DO NOT READ)	1	1.2	100.0	100.0
Missing	System	83	98.8		
Total		84	100.0		

**Which of the following categories best describes your race or ethnic identification? READ LIST.  
ACCEPT MULTIPLE RESPONSES.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Other (please specify)	3	3.6	100.0	100.0
Missing	System	81	96.4		
Total		84	100.0		

#### Other (please specify)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		81	96.4	96.4	96.4
	American	2	2.4	2.4	98.8
	European	1	1.2	1.2	100.0
Total		84	100.0	100.0	

**What is your total annual household income? READ LIST IF NECESSARY.**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Under \$7,500	8	9.5	10.1	10.1
	\$7,500 to \$14,999	16	19.0	20.3	30.4
	\$15,000 to \$24,999	17	20.2	21.5	51.9
	\$25,000 to \$49,999	9	10.7	11.4	63.3
	\$50,000 to \$74,999	4	4.8	5.1	68.4
	\$75,000 to \$99,999	3	3.6	3.8	72.2
	\$100,000 to \$149,999	1	1.2	1.3	73.4
	\$200,000 or higher	1	1.2	1.3	74.7
	Refused (DO NOT READ)	9	10.7	11.4	86.1
	Don't know (DO NOT READ)	11	13.1	13.9	100.0
Total		79	94.0	100.0	
Missing	System	5	6.0		
Total		84	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

**Have you ridden on regular public transit since you have been disabled (in your adult life)? (Regular public transit examples: bus systems such as Intercity Transit, Pierce Transit, Sound Transit, or other similar systems)**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	33	39.3	41.8	41.8
	No	46	54.8	58.2	100.0
	Total	79	94.0	100.0	
Missing	System	5	6.0		
Total		84	100.0		

**Have you used regular public transit in the past month?**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	11	13.1	33.3	33.3
	No	22	26.2	66.7	100.0
	Total	33	39.3	100.0	
Missing	System	51	60.7		
Total		84	100.0		

**Medicaid transportation services**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	3	3.6	3.8	3.8
	No	76	90.5	96.2	100.0
	Total	79	94.0	100.0	
Missing	System	5	6.0		
Total		84	100.0		

**Veteran's transportation service**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	1.2	1.3	1.3
	No	77	91.7	97.5	98.7
	Don't know	1	1.2	1.3	100.0
	Total	79	94.0	100.0	
Missing	System	5	6.0		
Total		84	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### Senior center van/shuttle

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	8	9.5	10.1	10.1
	No	71	84.5	89.9	100.0
	Total	79	94.0	100.0	
Missing	System	5	6.0		
Total		84	100.0		

#### Taxi

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	16	19.0	20.3	20.3
	No	63	75.0	79.7	100.0
	Total	79	94.0	100.0	
Missing	System	5	6.0		
Total		84	100.0		

#### Have you driven yourself in a car in the past month?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	28	33.3	35.0	35.0
	No	52	61.9	65.0	100.0
	Total	80	95.2	100.0	
Missing	System	4	4.8		
Total		84	100.0		

#### Have you ridden in a car with others in the past month?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	72	85.7	90.0	90.0
	No	6	7.1	7.5	97.5
	Don't know/can't remember	2	2.4	2.5	100.0
	Total	80	95.2	100.0	
Missing	System	4	4.8		
Total		84	100.0		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

**Do you have any other comments about Dial-A-Lift service, that is to say, anything that you would like to tell us about your experiences with Dial-A-Lift? PROBE: Anything else? INTERVIEWER NOTE: If a serious issue is mentioned, especially a safety or security issue, please provide details.**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	7	8.3	8.3	8.3
All she hears is good.	1	1.2	1.2	9.5
Always goes by, that's all I know.	1	1.2	1.2	10.7
As soon as she has some she will call to give them.	1	1.2	1.2	11.9
Dial-A-Lift drivers are top of the line, compassionate, very attentive. They seem to take pride in their job. I like how they customize the rides while regular transit does not. Without Dial-A-Lift, I would not have been able to keep my job.	1	1.2	1.2	13.1
Does not come to his area.	1	1.2	1.2	14.3
Doubt will mail application.	1	1.2	1.2	15.5
Expand service into more rural areas.	1	1.2	1.2	16.7
Great people.	1	1.2	1.2	17.9
Great service for elderly people.	1	1.2	1.2	19.0
Has been certified disabled through the government, why is the process so hard to become certified to use DAL service?	1	1.2	1.2	20.2
He has seen the bus but not used it.	1	1.2	1.2	21.4
I am grateful for the service and a life preserver for when I need.	1	1.2	1.2	22.6
I don't want to lose my ability to use Dial-A-Lift. The length of time is pretty long and not dependable.	1	1.2	1.2	23.8
I hear nothing but good stuff about Dial-A-Lift. My friends love it.	1	1.2	1.2	25.0
I hope you continue because a lot of people need it!	1	1.2	1.2	26.2
I think it's a good thing.	1	1.2	1.2	27.4
I think it's wonderful that they have provided it for us.	1	1.2	1.2	28.6
I wish they would get their act together and a little upset with them.	1	1.2	1.2	29.8
I would like the regular buses (Since I live by St. Peters Hospital) to operate until later at night.	1	1.2	1.2	31.0
I would like to learn how to use Dial-A-Lift.	1	1.2	1.2	32.1
If it wasn't for DAL I wouldn't have been able to go anywhere. It is a great service!	1	1.2	1.2	33.3



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

Improve the jurisdiction area and make it more available to more people. I would love to take Dial-A-Lift, but someone needs to pick me up. Have some kind of system for out-of-area residents to meet for taking Dial-A-Lift buses.	1	1.2	1.2	34.5
It's a good service when I needed it.	1	1.2	1.2	35.7
It's absolutely wonderful!	1	1.2	1.2	36.9
It's too hard to schedule rides 4 or 5 days in advance.	1	1.2	1.2	38.1
It is a great public service. He loves it!	1	1.2	1.2	39.3
It is inconvenient that DAL does not drive out of county. Yes there are drivers closer but her doctor is out of county and DAL won't take her.	1	1.2	1.2	40.5
It was very easy to use but I did encounter a couple of drivers who did not handle my panic/anxiety attacks well. Instead of helping to diffuse my anxiety attacks they made them worse by not answering my questions.	1	1.2	1.2	41.7
Lack availability.	1	1.2	1.2	42.9
My husband had D-A-L also and his doctor signed for permanent impairment (due to a hip replacement) as well as me (due to being almost completely blind) and DAL just provided the service for three months and cancelled it afterwards. I reapplied for DAL back in November of 2014 and still they haven't called me to notify me of anything. Notes: The bus stop is over 300 ft. from their house. Her husband can't ride public transportation because his wheelchair is too wide for regular buses.	1	1.2	1.2	44.0
No comments.	7	8.3	8.3	52.4
No I heard it's pretty good.	1	1.2	1.2	53.6
No it's a great service.	1	1.2	1.2	54.8
No it's pretty okay.	1	1.2	1.2	56.0
None.	11	13.1	13.1	69.0
Not applicable.	6	7.1	7.1	76.2
Not very effective for people who work.	1	1.2	1.2	77.4
Registration process took too long.	1	1.2	1.2	78.6
Seems that in the last couple of years, it has become more difficult no matter if you book a ride within 5 days or less. As a result, I take less frequent rides with Dial-A-Lift.	1	1.2	1.2	79.8
She feels it is hard to serve people like her but she is glad it is there.	1	1.2	1.2	81.0
She had a father that had a great time with us as a passenger. She just had issues very awful.	1	1.2	1.2	82.1
She loves it and will sign back up.	1	1.2	1.2	83.3





# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

Shouldn't take 4 months to be approved for the service.	1	1.2	1.2	84.5
So thankful for them and every driver I encountered has been completely awesome. Everyone on Dial-A-Lift is so helpful and polite.	1	1.2	1.2	85.7
Takes too long to arrive in Dial-A-Lift.	1	1.2	1.2	86.9
The drivers are really nice and the pickup window is a problem sometimes it takes to long!	1	1.2	1.2	88.1
They are wonderful and really like Dial-A-Lift. I wish I didn't have to lose them.	1	1.2	1.2	89.3
They need to get to his location.	1	1.2	1.2	90.5
Things come up and having to give 24 hours' notice is an inconvenience.	1	1.2	1.2	91.7
Unusual case where they needed a ride for this one time use, daughter usually takes him to appointments, she was out of town.	1	1.2	1.2	92.9
Very happy with the sign up process.	1	1.2	1.2	94.0
Waiting to try it.	1	1.2	1.2	95.2
We are excited to use it!	1	1.2	1.2	96.4
We need to get more buses on the road; they wait too long for appointments.	1	1.2	1.2	97.6
Wish it came closer to his home.	1	1.2	1.2	98.8
Would like to have someone go out to house, and show them how to use the service.	1	1.2	1.2	100.0
<b>Total</b>	<b>84</b>	<b>100.0</b>	<b>100.0</b>	

#### THANK RESPONDENTS FOR THEIR TIME.RECORD PASSENGER GENDER. (DO NOT READ)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Female	56	66.7	68.3	68.3
	Male	26	31.0	31.7	100.0
	Total	82	97.6	100.0	
Missing	System	2	2.4		
<b>Total</b>		<b>84</b>	<b>100.0</b>		

#### INTERVIEW COMPLETED WITH:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Passenger	57	67.9	100.0	100.0
Missing	System	27	32.1		
<b>Total</b>		<b>84</b>	<b>100.0</b>		



# 2015 Dial-A-Lift Current Rider and Non-Rider Satisfaction Surveys

## Intercity Transit

### Final Report

#### INTERVIEW COMPLETED WITH:

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Attendant (translated to rider - passenger's opinions)	5	6.0	100.0	100.0
Missing System	79	94.0		
Total	84	100.0		

#### INTERVIEW COMPLETED WITH:

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Attendant (attendant's opinions)	4	4.8	100.0	100.0
Missing System	80	95.2		
Total	84	100.0		

#### INTERVIEW COMPLETED WITH:

	Frequency	Percent
Missing System	84	100.0



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**INTERCITY TRANSIT AUTHORITY**  
**AGENDA ITEM NO. 7-B**  
**MEETING DATE: February 3, 2016**

**FOR:** Intercity Transit Authority

**FROM:** Jeff Peterson, 705-5878

**SUBJECT:** General Legal Counsel

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1) **The Issue:** Consideration of a one-year contract extension with Dale Kamerrer for the provision of general legal services.

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2) **Recommended Action:** Authorize the General Manager to execute a one-year contract extension with Dale Kamerrer, of Law, Lyman, Daniel, Kamerrer & Bogdanovich, P.S., to provide general legal counsel services at the rate of \$215 per hour.

---

3) **Policy Analysis:** The procurement policy states the Authority must approve any expenditure over \$25,000.

---

4) **Background:** Intercity Transit issued a Request for Qualifications and Proposals for General Legal Counsel on December 18, 2012 and the Intercity Transit Authority awarded the contract to Dale Kamerrer in March 2013. The contract was approved for a period of one year with the option of four one-year renewals. This renewal through March 31, 2017 represents the third option to renew.

Dale Kamerrer has been in private practice since 1989 advising and representing governmental clients in municipal law. Dale has experience in governmental liability, civil rights, general negligence, insurance defense, land use, personal injury, public official liability and other pertinent areas. Dale's firm, Law, Lyman, Daniel, Kamerrer & Bogdanovich, specializes in providing legal counsel to municipal corporations and offers a range of experience relevant to the needs of Intercity Transit.

Dale has experience as general legal counsel for the Washington State Transit Insurance Pool and represents many clients including the Washington Counties Insurance Fund, the Washington Cities Insurance Authority, and the Washington Counties Risk Pool. Dale served as Deputy Prosecuting Attorney for Thurston County and Assistant Attorney General in the Tort Claims Division for the State of Washington prior to entering private practice.

Staff recommends offering a one-year renewal of contract based on Dale Kamerrer's strong credentials and agency satisfaction with his work.

---

5) **Alternatives:**

- A. Authorize the Chair of the Intercity Transit Authority to execute a one-year contract extension with Dale Kamerrer, of Law, Lyman, Daniel, Kamerrer & Bogdanovich, P.S., to provide general legal counsel services, at a rate of \$215 per hour.
  - B. Defer action. At any time Intercity Transit may be required to seek general legal counsel services. If general legal counsel is not under contract, those services would have to be promptly purchased.
- 

6) **Budget Notes:** General legal counsel has several recurring tasks related to Authority meetings. Otherwise counsel's services are accessed on an as-needed basis. With that in mind, a total not-to-exceed contract cost cannot be predetermined. The 2016 budget identifies \$38,000 specifically for general legal services. Legal services are also charged to specific project budgets.

This contract renewal will remain at the current rate of \$215 per hour.

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7) **Goal Reference:** Through the provision of services, Intercity Transit's general legal counsel supports the fulfillment of all of the agency's goals.

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8) **References:** N/A.

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**INTERCITY TRANSIT AUTHORITY**  
**AGENDA ITEM NO. 7-C**  
**MEETING DATE: February 3, 2016**

**FOR:** Intercity Transit Authority

**FROM:** Katie Cunningham, 705-5837

**SUBJECT:** Federal Advocacy Services

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1) **The Issue:** Consideration of a one-year contract extension with Gordon Thomas Honeywell Governmental Affairs for federal advocacy services.

---

2) **Recommended Action:** Authorize the General Manager to execute a one-year contract extension with Gordon Thomas Honeywell Governmental Affairs to provide federal advocacy services on a retainer basis of \$6,000 per month.

---

3) **Policy Analysis:** The Procurement Policy states the Authority must approve any contract over \$25,000.

---

4) **Background:** In February 2013 Intercity Transit released a Request for Proposals for federal advocacy services, which resulted in a one-year contract award to Gordon Thomas Honeywell Governmental Affairs (GTHGA) in April 2013. The contract included four one-year renewal options. This item represents the third one-year renewal.

The details of current federal transportation authorization legislation remain uncertain. Debates continue inside and outside of Congress on federal transportation issues and policies related to current administration and future legislation. The Federal Transit Administration welcomes and encourages timely industry input. It remains beneficial for Intercity Transit to have an advocate in Washington DC to ensure our priorities and points of view are considered while legislation and regulations are developed and implemented. It is essential to stay in touch with appropriate members and staff of both houses of Congress to successfully identify and secure funding. This type of advocacy is difficult to perform from the outside.

GTHGA previously represented Intercity Transit on a five-year federal advocacy contract, and the agency has been satisfied with GTHGA's representation of its interests. When funding was available in the past, GTHGA was a valuable partner in assisting the agency to secure funding. As federal funding, policy

rules, and regulations remain uncertain, the need for Intercity Transit interests to stay engaged in Washington DC continues.

Staff believes GTHGA's rates continue to be fair and reasonable their services and recommends a contract renewal is awarded to Gordon Thomas Honeywell Governmental Affairs.

---

5) **Alternatives:**

1. Authorize the General Manager to execute a one-year contract extension with Gordon Thomas Honeywell Governmental Affairs to provide federal advocacy services on a retainer basis of \$6,000 per month.
2. Choose not to renew federal advocacy services at this time. All monitoring and advocating would be a staff exercise.

---

6) **Budget Notes:** The 2016 budget includes \$72,000 for federal advocacy services.

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7) **Goal Reference:** Securing grant funds for the development of capital projects and the purchase of vehicles supports **Goal #2:** *"Provide outstanding Customer Service."* It also supports **Goal #4:** *"Provide Responsive Transportation Options within Financial Limitations."*

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8) **References:** N/A.

**INTERCITY TRANSIT AUTHORITY**  
**AGENDA ITEM NO. 7-D**  
**MEETING DATE: February 3, 2016**

**FOR:** Intercity Transit Authority  
**FROM:** Pat Messmer, 705-5860  
**SUBJECT:** Annual Authority Reorganizing Activities

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1. **The Issue:** Election of Authority Chair and Vice Chair as well as committee appointments.

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2. **Recommended Action:**

- A. Election of the Intercity Transit Chair;
  - B. Election of the Intercity Transit Vice Chair;
  - C. Identify and approve Committee Assignments:
    - Thurston Regional Planning Council;
    - Transportation Policy Board;
    - Intercity Transit's Pension Committee.
- 

3. **Policy:** The Intercity Transit Authority bylaws, Article VI. Officers - Chair and Vice Chair, Section 6.2 Term, states, "The Chair and Vice Chair shall be elected from among the members at the first meeting in February of each year."

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4. **Background:** Officers serve a one-year term. There is nothing within the bylaws or past minutes requiring the officers to serve a minimum or a maximum number of consecutive terms. There are no written guidelines regarding how the positions are filled. At the annual reorganization meeting scheduled for each February, it is the responsibility of the Transit Authority to elect a Chair and Vice Chair to lead and represent the Authority for the following year.

The Chair position was held by Nathaniel Jones and the Vice Chair position was held by Ryan Warner. Both served in those roles for one year.

Attached are current committee assignments. The terms of the committee appointments coincide with the terms of the Authority officers. Representations include the Thurston Regional Planning Council (TRPC), Transportation Policy Board (TPB), and Intercity Transit's Pension Committee.

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5. **Alternatives:**

- A. Elect officers and approve committee assignments.



- B. Defer elections and assignments. The current Vice Chair would continue to serve until elections are finalized. If the Vice Chair is absent, the most senior member would serve as the presiding officer. Our most senior officer is Citizen Representative Karen Messmer.

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6. **Budget Notes:** N/A.

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7. **Goal Reference:** The Authority and its officers represent the agency. Representation at TRPC and TPB enable the Authority to share its goals, gain support and develop partnerships to help achieve all goals.

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8. **References:** Committee Assignments and Responsibilities. Intercity Transit Authority Bylaws - referencing 5.8 of Article V - Chair; Article VI. OFFICERS - CHAIR AND VICE CHAIR; and VII. COMMITTEES 7.1 Authority Committees.

**INTERCITY TRANSIT AUTHORITY  
COMMITTEE ASSIGNMENTS  
As of February 2015**

Each year in February, at the reorganizational meeting, the Intercity Transit Authority approves committee assignments, as follows:

**Thurston Regional Planning Council:** General responsibilities include attendance at the monthly Thurston Regional Planning Council meetings and providing a monthly report to the full Authority. Meets the 1st Friday of the month at 8:30 AM.

***Karen Messmer***  
(Alternate: *Debbie Sullivan*)

**Transportation Policy Board:** General responsibilities include attending the monthly Transportation Policy Board meetings and providing a monthly report to the full Authority. No standing dates - generally meets at 7:00 AM on the first Wednesday of the month.

***Ryan Warner***  
(Alternate: *Jeff Gadman*)

**Pension Committee:** The Intercity Transit Pension Committee consists of a Plan Committee (two permanent staff positions, one Authority member, and four employees), and the Executive Committee (two permanent staff positions and the Authority member); the Executive Committee selects services and makes decisions that comply with policy set by the Plan Committee as a whole. Meets quarterly - dates to be announced.

***Joe Baker***

**Ad Hoc Committees:** The Authority Chair may form ad hoc committees to address specific issues.

**Committee of the Whole:** The Authority Chair may form a "Committee of the Whole," composed of all Authority members, to address major issues.

The Olympian is designated as the official newspaper of the Authority for the purpose of publication of legal notices and dissemination of public information announcements.

**5.7 Quorum.** At all meetings of the Authority, five voting members shall constitute a quorum for the transaction of business. (Res. 5-2010)

**5.8 Chair.** The Chair shall open and preside at all meetings of the Authority. In the event of the Chair's absence or inability to preside, the Vice Chair shall assume the duties of presiding over the meetings of the Authority; provided, however, if the Chair is to be permanently unable to preside, the Authority shall select a new Chair for the remainder of the Chair's term. In the absence of both the Chair and Vice Chair, the voting member having served on the Authority the longest shall serve as acting Chair. (Res. 5-2010)

**5.9 Conduct of Meetings.** Unless otherwise governed by the provisions of these Bylaws, the laws of the State of Washington or Authority resolution, Roberts Rules of Order (newly revised) shall govern the conduct of Authority meetings. It is the intent of the Authority to conduct the business in an open environment consistent with the State Open Public Meetings Act.

**5.10 Order of Business and Agenda.** The order of business at regular meetings, work sessions, and special Authority meetings shall be established on a meeting-by-meeting basis according to the issues requiring discussion in any particular month. Prior to any meeting of the Authority, the Clerk of the Authority and the General Manager will confer with the Chair on items of discussion. The Clerk will prepare a written agenda including appropriate attachments and will distribute to all members as soon as possible prior to the meeting, but not less than 48 hours before the meeting. (Res. 02-93; Res. 05-2001; Res. 03-2007)

**5.11 Voting/Authority Decisions.** Every voting member of the Authority shall be entitled to one vote on all issues before the Authority; the nonvoting member is entitled to no vote. All voting members present may vote or abstain; an abstention shall be recorded but not be counted. The act of the majority of the voting members present at a meeting at which a quorum is present shall be the act of the Authority, unless a greater number is required by law. The majority vote must have at least three affirmative votes in order to be an Authority decision. Any member may require that the vote of each member on a particular matter be recorded in the minutes, in which case a roll call will be taken. (Res. 94-89; Res. 2-06; Res.5-2010).

**5.12 Meeting Minutes.** The proceedings of all Authority meetings, work sessions, and public hearings shall be recorded and maintained and shall contain

an accurate accounting of the Authority's official action with reference to all matters properly before it and any public comments made. Minutes of the meetings shall be provided to each Authority member as soon as practicable following each meeting.

The official copy for each meeting shall be approved by the Authority, signed by the Chair and Clerk of the Board and shall become part of the permanent records file, maintained by the Clerk. (Res. 05-2001)

**5.13 Resolutions.** The Authority may require certain action be documented by way of a formal resolution, which shall be prepared by the Clerk of the Board, and once approved by the Authority, shall be signed by the Chair and Clerk. The resolution will be numbered, dated, incorporated in the minutes, and made part of the permanent records file. (Res. 2-06)

**5.14 Compensation.** Voting and nonvoting members of the Authority shall not be compensated for meeting attendance. Any change to Section 5.13, Compensation, of the Intercity Transit Authority bylaws shall require a two-thirds majority vote by the Authority. (Res. 20-81; Res. 63-84; Res. 2-93; Res. 2-98; Res. 4-99; Res. 6-02; Res. 5-2010).

## **VI. OFFICERS - CHAIR AND VICE CHAIR**

**6.1 Election.** The Chair and Vice Chair shall be voting members of the Authority elected by the voting members by majority vote at a regular or special meeting of the Authority. (Res. 5-2010)

**6.2 Term.** The Chair and Vice Chair shall be elected from among the voting members at the first meeting in February of each year. In the event either position becomes vacant, the voting members shall elect a new officer at the next regular meeting to serve until the next February meeting. (Res. 1-91; Res. 5-2010)

**6.3 Duties.** In addition to the powers and duties granted by these Bylaws, the Chair shall have such other powers and duties as shall be prescribed by law or by resolution of the Authority.

In the absence of the Chair, the Vice Chair shall perform the duties of the Chair, and when so acting, shall have all the powers of and be subject to all the restrictions upon the Chair. The Vice chair shall perform other duties as may be assigned to him or her by the Chair or by the Authority. In the absence of the Chair and Vice Chair, the most senior member of the Authority in attendance shall perform the duties of the Chair, and when so acting, shall have all the powers of and be subject to all the restrictions upon the Chair. (Res. 2-93; Res. 1-96)

## **VII. COMMITTEES**

**7.1 Authority Committees.** In order to better facilitate the work of the Authority, the Authority may establish standing and/or ad hoc committees to address specific issues. Each committee shall be composed of not more than four Authority members. Committee Chairs and committee members shall be designated by the Authority Chair, subject to the confirmation by the full Authority. To the extent possible, committee reports to the full Authority shall be in writing.

Terms of standing committees will coincide with the terms of the Authority officers (which recommence annually in February), at which time the Authority will review the responsibilities of the committees. In the event that new committee assignments are not made at the time Authority officers are elected, the incumbent committee members shall serve until replacements are appointed. (Res. 61-84; Res. 76-86; Res. 1-91; Res. 2-93).

**7.2 Special Appointments.** The Chair may appoint Authority members to special intra- and interagency committees and councils as appropriate.

These special appointments will be reviewed annually to coincide with the terms of the Authority officers and the review of Authority committees.

## **VIII. APPOINTED POSITIONS**

**8.1 General Manager.** The Authority shall appoint a General Manager who shall be responsible for the executive and administrative functions of Intercity Transit and who shall have such power and perform such duties as shall be prescribed by law and action of the Authority. (Res. 1-96; Res. 03-2007)

**8.2 Legal Counsel.** Principal Legal Counsel shall be appointed by and shall serve at the pleasure of the Authority.

**8.3 Clerk of the Board.** The General Manager recommends appointment of a Clerk of the Board and the Authority takes official action on the appointment. The Clerk of the Board shall have such power and perform such duties as prescribed by law or action of the Authority. (Res. 1-96; Res. 2-06)

## **IX. GENERAL PROVISIONS**

**9.1 Warrants.** All disbursements of Intercity Transit shall be by warrant drawn by the appropriate administrative director as per Authority resolution or as otherwise directed by law. All requests for warrants shall be signed as directed by Authority resolution. (Res. 68-85; Res. 75-86).

## TRPC Members & Representatives

**City of Lacey**  
Virgil Clarkson

**City of Olympia**  
Nathaniel Jones

**City of Rainier**  
Dennis McVey

**City of Tenino**  
Bret Brodersen

**City of Tumwater**  
Tom Oliva

**City of Yelm**  
Robert Isom

**Confederated Tribes of the Chehalis Reservation**  
Amy Loudermilk

**Nisqually Indian Tribe**  
James Slape

**Town of Bucoda**  
Alan Vanell

**Thurston County**  
Sandra Romero

**North Thurston Public Schools**  
Chuck Namit

**Olympia School District**  
Allen Miller

**Intercity Transit**  
Karen Messmer

**LOTT Clean Water Alliance**  
Cynthia Pratt

**Port of Olympia**  
George Barner

**PUD No. 1 of Thurston County**  
Russell Olsen

### Associate Members

**Economic Development Council of Thurston County**  
Michael Cade

**Lacey Fire District #3**  
Gene Dobry

**Puget Sound Regional Council**  
Vacant

**The Evergreen State College**  
Jeanne Rynne

**Timberland Regional Library**  
Cheryl Heywood



REGIONAL VISION • COOPERATION • INFORMATION

## PRE-AGENDA Friday, June 5, 2015 8:30 a.m. – 11:00 a.m.

The TRPC pre-agenda provides our members the opportunity to review the topics of the upcoming TRPC meeting. This information is forwarded in advance to afford your councils and boards the opportunity for discussion at your regular meetings. This will provide your designated representative with information that can be used for their participation in the Regional Council meeting. For more information, please visit our website at [www.trpc.org](http://www.trpc.org).

### Consent Calendar

### ACTION

These items were presented at the previous meeting. They are action items and will remain on consent unless pulled for further discussion.

- a. Approval of Minutes – May 1, 2015
- b. Approval of Vouchers
- c. Approval of RTIP Amendment 15-06
- d. Approval of CY 2015 Administrative Amendment to the RTP
- e. Approval of Request for Increased Award – “Tumwater Historical Park Trail Connection”

### CY 2015 Call For Projects – Candidate Proposals

### ACTION

TRPC is asked to select those projects to receive federal STP, TAP, and CMAQ funding and to approve an amendment to the Regional Transportation Improvement Program adding the selected projects. The Transportation Policy Board evaluated the candidate projects and forwarded its recommendation to TRPC on funding priorities.

### 2015 Legislative Session

### UPDATE / DISCUSSION

Staff will provide an overview of the 2015 Special Session which began on April 29, 2015.

### TRPC Retreat Subcommittee Report

### DISCUSSION

The TRPC retreat is scheduled for all day on July 10, 2015 and will be held at the Thurston County Emergency Coordination Center (ECC) on Tilley Road. The retreat sub-committee met on May 4th to finalize the interview questions that the contracted facilitator, Rick Kramer, has since conducted. The preliminary results of the interviews as well as feedback from the TRPC staff retreat will be presented to the sub-committee at their next meeting on June 5th. At that meeting, the sub-committee will draft an agenda for the retreat.

### RTIP Amendment 15-07

### 1<sup>st</sup> REVIEW

WSDOT proposes adding a new paving project to the consolidated Asphalt/Pavement Preservation Project. A significant change in the scope of work requires TRPC action. TRPC action expected in July.

### Foresight into Transportation’s Future & Its Impacts on Today’s Decision-making

### PRESENTATION

The rapid pace of change affects all aspects of life and society, including transportation. How do organizations – local agencies, state DOTs, schools, regional planning agencies – understand and plan for transportation needs when the future is so uncertain? The Transportation Research Board has developed a suite of research reports and tools to help agencies think strategically about the future and make decisions today that are robust under a range of possible future scenarios. This briefing and discussion will introduce these tools and resources to TRPC.

### Grant Consortium

### DISCUSSION

Staff will provide an update on current efforts regarding the establishment of a regional grant consortium.

### Revised Population & Employment Forecast Allocations

### 1<sup>ST</sup> REVIEW

TRPC is in the midst of updating the Regional Transportation Model, and the transportation team has requested that the Population and Employment Forecast allocations be extended to the year 2040. This agenda item reviews draft population and employment forecast allocations. Action will be requested at TRPC’s July meeting.

### Ride Your Bike, Thurston County!

### INFORMATION

On May 12, TRPC released the 5th print edition of the Thurston County Bicycle Map. In addition to updated route information, the new map includes a fresh format, mountain bike trails, and instructions for loading a bike on an Intercity Transit bus. Members will learn who and what is involved with producing the map, where it’s available in the community, and a demonstration of the map on a smart phone app.

**Minutes**  
**INTERCITY TRANSIT**  
**CITIZEN ADVISORY COMMITTEE**  
**May 18, 2015**

**CALL TO ORDER**

Chair Van Gelder called the May 18, 2015, meeting of the Citizen Advisory Committee (CAC) to order at 5:30 p.m. at the administrative offices of Intercity Transit.

**Members Present:** Chair Michael Van Gelder; Vice-Chair Carl See, Victor VanderDoes; Joan O'Connell; Kahlil Sibree; Jan Burt; Billie Clark; Denise Clark; Lin Zenki, Faith Hagenhofer, Mitchell Chong; Sue Pierce; and Ursula Euler.

**Absent:** Julie Hustoft; Valerie Elliott; Quinn Johnson; Charles Richardson; Dale Vincent; Grace Arnis; and Leah Bradley.

**Staff Present:** Dennis Bloom and Nancy Trail.

**Chair Van Gelder** noted General Manager Ann Freeman-Manzanares would attend the meeting via teleconference. Please raise your hands and wait to be acknowledged prior to speaking so Ann will know who is speaking.

**APPROVAL OF AGENDA**

It was M/S/A by HAGENHOFER and EULER to approve the agenda.

**INTRODUCTIONS**

Van Gelder introduced Authority member, Ed Bricker.

**MEETING ATTENDANCE**

- A. June 3, 2015, Regular Meeting - Julie Hustoft
- B. June 17, 2015, Work Session - Quinn Johnson

**APPROVAL OF MINUTES**

It was M/S/A by CLARK and ZENKI to approve the minutes of the April 20, 2015 meeting.

**CONSUMER ISSUES CHECK-IN** - Issues for discussion later in the meeting include:

- VanderDoes - another kudos to share.

*O'Connell arrived.*

**NEW BUSINESS**

## **Intercity Transit Citizen Advisory Committee**

**May 18, 2015**

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- A. CAC SELF-ASSESSMENT -** (*Nancy Trail*) Trail indicated each year the CAC participates in a self-assessment process. This year staff decided, on the recommendation of Charles Richardson, to move from the traditional paper survey to an on-line survey.

Trail stated staff will distribute the link to the survey via email and would appreciate responses completed by June 5, 2015. Staff will compile the results and they will be discussed at the June meeting. Results will also be shared and discussed at the joint meeting with the ITA.

- B. NOMINATION OF OFFICERS -** (*Nancy Trail*) Trail reviewed the CAC Bylaws regarding the process for choosing officers which shall consist of nominations in May and affirmation by majority votes in June. If only one person is nominated a unanimous ballot may be cast. Nominations from the floor are not accepted at the June meeting.

Trail opened the floor for nominations. The following were nominated for Chair: Sue Pierce; Denise Clark; Victor VanderDoes; Lin Zenki; and Ursula Euler.

Trail called for any additional nominations for chair and having received none, closed the nominations.

Trail opened the floor for nominations for Vice Chair. The following were nominated: Jan Burt; and Denise Clark.

Trail called for any additional nominations for Vice Chair and having received none, closed the nominations.

Trail answered questions.

*Zenki* – asked if voting was done by secret ballot.

*Trail* - responded that voting by secret ballot was in violation of the Open Public Meetings Act.

- C. ROUTE 42 SERVICE REQUEST -** (*Dennis Bloom*) Bloom introduced himself as the planning manager and Steve Swan as his associate planner. He indicated the requested changes are in the material received in the packet and a handout. The request came about in response to the opening of the Accountability and Restitution Center (ARC). Route 42 is a small circulator route serving the Community College. The route provides transfers to the 43 and 44 routes. The new county jail has a work release program and part of the request is to assist those participating in this program. Route 42 began in 1998 and is the slowest performing route we have. Over the last 3 or 4 years we have narrowed service down into groups of service including morning, midday and afternoon. It meets the needs of the juvenile detention center and we have stayed in touch with the County on that.

Bloom stated with the opening of the new facility the County has asked us to extend service hours from 7:00 am to 7:00 pm with half hour service frequency. If we were to go the full timeframe requested it would increase daily trips from 15 to 25. Currently we are looking at 3 options. Option 1 extends the route and leaves the service as it is. This adds more miles to



## **Intercity Transit Citizen Advisory Committee**

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the route but only 15 trips per day. Option 2 adds 2 additional trips in the early evening extending to 7:00 pm to accommodate the work release program. By extending 2 trips there is an 11% increase in our costs. One thing to point out is that this includes not only revenue hours but also dead-head time. When we program service we do it by total service miles. Option 3 is we move the times by 5 minutes for each of those blocks. Anytime we move a route it triggers a notification process. This option represents a 71% increase in miles, hours and costs. Bloom indicated we are looking for comments on these options.

Bloom answered questions.

*Pierce* - asked if the county is going to chip in any money.

*Bloom* - responded the County has not offered any at this point.

*Pierce* - inquired why the County waited so long before asking.

*Bloom*- indicated they weren't sure when they would be able to open it. The facility was complete in 2010 and they weren't able to fund the operation until this year. We didn't know the request was going to be this number of hours, and thought it was simply going to extending the route. The actual mileage increase is .08.

*Clark, D.* - asked if there is really a need to extend service from facility opening/closing and if there would be enough riders outside the current 3 blocks of time.

*Bloom* - indicated the County initially wanted 7:00 am to 12:00 pm and then pick up again 3:00 pm to 7:00 pm. Family Court needs the service as it is currently blocked.

*Sibree arrived.*

*Clark, D.* - inquired if the County would provide data for a few years and then determine an average.

*Bloom* - stated we still have to do some homework.

*Chong* - asked if the County could do some type of survey for the route. Then we could do some type of pilot program.

*Bloom* - responded the County has not identified how many people are in the work release program. With the new facility opening it will attract people. There are a few hundred houses in the area and a number warehouses. This may increase ridership for a low-performing route.

*See* - indicated his inclination was to support option 2 and ask for the County to make the case for themselves with data to back it up, or for us to gather the data via a pilot project. He asked if parking was an issue at the facility.

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*Bloom* - indicated the County has a commute trip reduction program for all its employees. They encourage people to take alternate transportation. The County pays for employees to ride transit.

*Bricker arrived.*

*Hagenhofer*- indicated she thinks the population could work and doesn't think the County would ask without having the numbers to back it up. She is in favor of option 3.

*Zenki*- stated she agrees with Hagenhofer. You get more bang for your buck with option 3. Serving the college more frequently would benefit people and she would like to see us make a generous attempt to get people out there.

*O'Connell* - indicated she doesn't agree that the County knows the numbers. The ridership is important but it's not going to make up the difference in the cost.

*Bloom* - responded we subsidize ridership with the cost per rider at approximately \$4.75. The County created a facility and it is pretty isolated. They just assumed that service was going to be provided. NE Lacey has been asking for service for a long time and they don't have it.

*Sibree* - stated he is inclined to recommend option 3. They should be able to count on certain services at certain times. The citizens that need it the most are the people at the ARC.

*Euler* - indicated she is concerned about the budget on option 3 because she doesn't have enough information to spend money like that. A testing period of time would be a good idea. Option 2 provides them the extended time and it might be a good incentive, if ridership goes up a certain degree to consider expansion into option 3. Bus replacement and the elimination of federal funding are more pressing issues.

*Pierce* - stated she agrees with Euler and that the concept of build it and they will come doesn't always work with transit. Option 2 is a little bit of an increase and the pockets of time may meet those needs and seems like a good way to get started and give the County time to get their numbers together to justify the things they are asking for in their dream plan.

*VanderDoes* - indicated it has been a long time opening, how long do you think it will stay open. He supports option 2 - it provides something.

*Bloom* - stated that is difficult to answer. They are closing the other one, so it would mean they would need to keep it open.

*O'Connell* - asked if this includes staff going back and forth.

*Bloom* - responded the County didn't disclose that information. Even though we've asked the question there is a certain amount of reluctance to provide the information. They won't give a specific date for opening.

*Clark, D.* – indicated the starting time may not get the work release participants where they need to be if they start at 7. Finding out the start time average would be beneficial.

*Bloom* – responded the original question was what time.

*O’Connell* – indicated if it comes to the point where you have to help them solve their own problem, they know the schedules and there could be a meeting point.

*Bloom* – stated the County released an RFP for someone to provide service on the weekends. Funding to bring additional service is an issue and we’re not going for a ballot measure this year. There is no funding to extend service, so who shares those expenses.

*Van Gelder* – stated there are concerns about increased costs and awareness of tradeoffs recognizing that there have been other areas that have asked for service. If the agency would be performing a useful public service assisting families to get together and the cost would be for a social good. Ridership may increase. Let us know if you need anything more from us.

**D. STRATEGIC PLAN - GOALS AND END POLICIES** (*Dennis Bloom*) Bloom indicated he was presenting this agenda item on behalf of Ann. The Strategic Plan document is online and these are some of the notes from the ITA’s first meeting on the policy positions for the 2016-2021 Strategic Plan. The ITA had some ideas regarding wordsmithing the goals and end policies which are very succinct and provide direction. The policy analysis is reflective of the goals. There are currently 5 goals and they are suggesting an additional goal to help provide direction to staff and the agency.

**Goal 1** Assess the transportation needs of our community PTBA-wide.

**End Policy** – Intercity Transit Authority, staff and the public will have access to clear and comprehensive information related to the transportation needs of our community.

*Euler* – asked why they wanted to add “PTBA-wide.”

*Bloom* – We currently do not provide services to everyone within the PTBA. In addition, people think that community-wide means more than the PTBA. We are not talking about anything outside the PTBA at this point. The public may not be aware of the PTBA and they are trying to narrow it down to the current boundary.

*Hagenhofer* – stated she really appreciates the specificity of this – it allows the authority to see where there are gaps in the service in the PTBA. It is good to know that because then it can be addressed.

*Euler* – asked if the area has been adjusted in recent history in the last few years.

## Intercity Transit Citizen Advisory Committee

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*Bloom* – responded that in 1999 a statewide initiative removed the excise tax and when it was approved, we lost 45% of our budget. As a result we had to cut 42% of our service and reduce our boundaries.

*Sibree* left.

**Goal 2** Provide outstanding customer service.

**End Policy** – Customers will report high satisfaction. ~~And ridership will increase.~~

Bloom indicated we may face a situation where we have to reduce service due to the elimination of federal funding. Our success, in that instance shouldn't be measured on ridership increasing.

**Goal 3** Maintain a safe and secure operating system.

**End Policy** – All Intercity Transit facilities, customers and employees will be assured safety and security.

Bloom stated there was no change to goal 3.

**Goal 4** Provide responsive transportation options within financial limitations.

**End Policy** – Customers and staff will have access to programs and services that benefit and promote community sustainability.

Bloom indicated that in addition to the elimination of federal funding, the Thurston County area has been slow to recover from the economic downturn and our area is just beginning to recover. Adding “within financial limitations” recognizes that we have limited funds.

**Goal 5** Align best practices and support agency sustainable technologies and activities.

**End Policy** – Resources will be used efficiently with minimal impact on the environment.

Bloom stated goal 5 does not change.

Bloom indicated the ITA is adding a new goal recognizing the importance of education.

**Goal 6** Encourage use of services.

**End Policy** – Educate and encourage community members to explore the benefits of public transportation.

Bloom stated this underscores the need to have outreach and educate people. The agency made a request for some grant funding from TRPC for grant funds to create a community conversation to look at what happens to public transportation in the parameters of the budget. If we don't get the sales tax increase we'll be asking for additional funding or we'll be looking at reducing service. TRPC recommended our request for funding go through for approval

*O'Connell* – remarked that this would allow the dialogue to continue. She would like to see a conversation started if you were in a position to use transit and don't, why not. By doing this we can start breaking myths. This kind of dialogue makes our system safer.

*Pierce* – indicated goal 6 has been a part of the conversation for a long time.

**E. 2016-2021 STRATEGIC PLAN POLICY POSITIONS** (*Dennis Bloom*) Bloom stated this is the first of several strategic plan discussions surrounding the annual update. Staff will be coming back with additional questions following future discussions. Bloom indicated he would go through each one and that this will be a continuing conversation over the next few months.

**1. Are there capital purchases or other projects that are needed to allow future growth?**

Authority direction for 2015 was to dedicate funds to replace the underground storage tanks at the Pattison Street facility, dedicate funding to enhance bus stops and shelters and look for opportunities to complete final design and construction of the Pattison Street facility.

**Question:** Should we dedicate funds to complete the final design for the Pattison Street facility rehabilitation and expansion project placing us in a more competitive position should funding become available?

Bloom indicated the agency has been able to piece together some funding this year and DOT has set aside some funding along with surface transportation funding to add to this project.

*Hagenhofer* – asked if other transit systems in the nation have LIDs that are facility specific.

*Bloom* – responded yes they do.

*Hagenhofer* – asked what the agency's history is of considering one.

*Bloom* – indicated it is down to the local level how regional money is distributed. For example the federal money that is now available since MAP 21 goes to much larger metropolitan areas and some small rural systems. It is the smaller to medium systems that don't get money anymore.

*Hagenhofer*- asked if it would be something that the ITA could discuss.

*Bloom* – indicated they may. You will most likely see other jurisdictions asking for LID's as Tumwater just did. They are looking at the same thing and that is one of the avenues they are using.

*Van Gelder* – suggests the ITA look towards the IRS 6320 rule that allows the public entity to contract with a private entity to develop a facility and that private entity raises funds on the private market, with very little liability on the public entity. They then create a lease and at the end of the lease it is the agency's free and clear.

*Hagenhofer* - remarked that arts organizations use it quite successfully.

**2. How do Village Vans, Community Van, the Surplus Van Grant, and Discounted Bus Pass Programs fit into Intercity Transit's future plans? Are there other programs of this type that should be considered?**

Authority direction for 2015 was to continue all of these programs in future years.

**Question:** Village Vans has been funded in part by federal JARC funds. Those federal funds have been eliminated but quite recently a new potential grant source was announced. Award of those funds is uncertain. If grant funding is not available, does the Authority wish to continue to support the Village Van program with local dollars?

*Clark, D.* - stated there weren't enough statistics in the presentation provided last month.

*Bloom* - remarked we can get additional information. It is a unique program and there are other agencies trying to replicate it.

*VanderDoes* - stated as with any other grant funded programs we can't say Village Vans yes or no, but what do we lose if we fund it. We have to weigh it against everything else that isn't being funded by a grant.

*Euler* - asked how this fits into the mission and vision because it is a policy position and is this getting down to a core that doesn't really help. People have to start riding the bus more. Is that really part of the core and vision and mission that Intercity Transit has, and maybe that's the real question. Does it apply to all the funding sources? Can money be spent differently so the financial feasibility grows so we get a better diversity of people riding the bus?

*Bloom* - indicated the program serves a very specific clientele that lack employment and in the program we are helping them become more participatory in the economy.

*Pierce* - remarked if grant funding is not available and there other programs or other places that have started their own version, maybe we can partner with them.

**3. What roll should Intercity Transit play in local transportation projects - Commute Trip Reduction, Youth Education Programs and the Bicycle Commuter Contest?**

Authority direction for 2015 was to continue our work in all of these areas.

**4. Should Intercity Transit pursue additional park and ride facilities at this time?**

Authority direction for 2015 was to not pursue additional park and ride facilities at this time.

*Van Gelder* - remarked we should search for partners that go beyond DOT.

**5. Should transit priority measures - signal priority, queue bypasses, bus lanes - be considered?**

Authority direction for 2015 was to implement the pilot signal preemption program.

*Bricker* – remarked with an enthusiastic yes!

**6. What additional investments in technology should be made?**

Authority direction for 2015 was to develop a plan to address server room issues as well as implement low level improvements to our website, telephone, and advanced communications system.

Bloom indicated we moved our server room to DOT as part of these efforts.

*Zenki* – inquired about the integration of the ORCA card.

*Bloom* – responded the smart cards are something we’re pursuing.

*Zenki* – inquired about the use of smart phones and that it would be very convenient.

*Bloom* – remarked that Trimet does it right now.

**7. Should the vanpool program continue to expand to keep pace with demand?**

Authority direction for 2014 was to add one Vanpool Coordinator to support the continued growth of the program and provide the addition of 10 new groups a year. The program did not add 10 vehicles to the program in 2015.

*Hagenhofer* – asked if new groups/vehicles are the same thing.

*Bloom* – responded each group would need a vehicle.

*Hagenhofer* – remarked this ties to goal 6 and is a great fit for people who think they don’t want to use public transportation.

*Bloom* – indicated JBLM is up to 30 vans. The market is still ripe. Even though gas prices have fallen, the interest to commute as a group is still there.

*Hagenhofer* – asked if groups more often organized around shared employer or where they live.

*Bloom* – stated it is typically around the end destination. It has to be at least 10 miles round trip and the average is around 50-60 miles.

*Clark, D.* – remarked that this links up with goal 4 in additional park & rides and goal 6 and they all interconnect. Even though gas prices have dropped one of the things that has been on her mind in getting riders is getting on the “green” band wagon.

*Bloom* – indicated he would differentiate vanpools because they can meet at a lot of different places. A park and ride lot has transit service. We don’t have many park and pool lots. It is typically at a church because they aren’t using it during the week.

*Euler* – asked how much vanpools are subsidized.

*Bloom* - stated they mostly pay for themselves with over 90% recovery.

*Euler* - asked if this includes the purchase of the vehicle.

*Bloom* - responded they are typically purchased with grant funds. We have 213 vanpools on the road.

**8. Are our services - Dial-A-Lift, Travel Training and Accessible Fixed Route Buses adequate to serve persons with disabilities?**

Authority direction for 2014 was to add a Travel Trainer position and focus on expanding the travel training program with Bus Buddies. We continue to build both programs. Award of Bus Buddies funding is uncertain.

**9. Is the current fare policy appropriate?**

Authority direction for 2015 was to retain our policy to review fares every three years. Our last fare structure became effective February 2013. Continuing this practice necessitates a review.

*Clark, D.* - asked if the current structure is sustainable with today's budget.

*Bloom* - responded it is under the current budget. In anticipation of going out for a sales tax election, a piece to that is the board went ahead and raised the fares by \$.25. This was a 33% increase, and as a result you will lose ridership. There is that tradeoff. We looked at the cost of living and people who ride the bus and those are the elements that go into the conversation with the transit authority.

*Clark, D.* - asked if it is sustainable not to raise it.

*Bloom* - indicated the numbers Ben brought forward currently sustain it. It doesn't address replacing the fleet, or Pattison replacement, or increase in service. The base adult fare is \$1.25. The question is do we continue to revisit this every 3 years.

*Pierce* - remarked having it on a schedule every 3 years is beneficial and reasonable.

*Burt* - remarked that since there are certain things considered during a fare increase - is there a formula.

*Bloom* - responded we look at what the local economy is doing, cost of living, cost of goods, etc. Then he does an elasticity study that is based on a formula.

*Chong* - stated if we do present a fare increase to the public we should show them positive changes that will happen with the increase.

*VanderDoes* - stated everything goes up every year and thinks we should look at it every year. It's a mistake not to, at a minimum every 2 years.



## **Intercity Transit Citizen Advisory Committee**

**May 18, 2015**

**Page 11 of 11**

*Clark, B.* - remarked it is like the postage stamp it is one of the best deals around, riding the bus is a really good deal.

### **CONSUMER ISSUES**

- *VanderDoes* - attended a Kokua board meeting recently, and they provide supportive living services for the developmentally disabled. They were looking to expand services. The feedback at the meeting and with other people who have handicapped children was positive for our transit system. He doesn't normally mention the CAC, but we are very well thought of in that community.

*Van Gelder* - This is all part of the story we can tell about Intercity Transit.

### **REPORTS**

- *Burt* - provided the report from the May 6, 2015, Authority meeting including the introduction of new employees; scheduling a public hearing for June 3<sup>rd</sup> on Route 42 Service Request; authorized several purchases; and changed the CAC recruitment to the fall.
- *Trail* - asked members to mark their calendars for our annual Transit Appreciation Day celebration on August 12, 2015. Trail reported that the Intercity Transit Wellness Committee had recently received recognition from the State of Washington Team WorkWell for our program and received the American Heart Association's Fit Friendly Worksite designation. Trail then read a letter from the Lacey Police Department recognizing Intercity Transit's assistance in a recent criminal investigation.

**NEXT MEETING: June 15, 2015.**

### **ADJOURNMENT**

**It was M/S/A by O'CONNELL and BURT to adjourn the meeting at 7:40 pm**

Prepared by Nancy Trail, Recording Secretary/  
Executive Assistant & Public Records Officer, Intercity Transit  
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**INTERCITY TRANSIT AUTHORITY**  
**AGENDA ITEM NO. 7-A**  
**MEETING DATE: June 03, 2015**

**FOR:** Intercity Transit Authority  
**FROM:** Bob Holman, 705-5885  
**SUBJECT:** 2016-19 Transportation Improvement Program Adoption

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- 1) **The Issue:** Whether to adopt the 2016-19 transportation improvement program (TIP) for projects with anticipated Federal Transit Administration (FTA) funding over the next four years.

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- 2) **Recommended Action:** Adopt the 2016-19 Transportation Improvement Program (TIP) for projects with anticipated FTA funding.

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- 3) **Policy Analysis:** Federal grant guidelines require that a TIP be adopted by the governing body.

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- 4) **Background:** The draft 2016-19 TIP for projects with anticipated FTA funding was introduced to the Intercity Transit Authority on April 1, 2015, at which time the Authority scheduled a Public Hearing for May 6, 2015. Staff made the TIP available to the public and solicited public input. A public hearing was held on May 6, 2015. At that time there were no public comments, nor were there written or other comments made before or since that hearing.

The 2016-19 TIP that staff made available to the Authority and to the public for review contains the following elements:

- Preventive maintenance of vehicles in Intercity Transit's fleet during the years 2016-2019;
- Purchasing heavy duty coaches to replace those that have been in service beyond their expected useful life;
- Purchasing additional or replacement vanpool vans;
- Construction to replace aging underground storage tanks (USTs) at Intercity Transit's maintenance and operations facility;
- Conducting a Youth Education Program that fosters potential for using transit and/or bicycle forms of transportation;
- Providing bus stop enhancements including ADA improvements; and
- Operations funding with PSRC "earned share" for activities supporting vanpool vans and commuter coach operations.

Staff identified one additional project in the 2016-19 TIP and applied for federal funds through TRPC's selection process for allocating their share of 2015 Federal Highway Funds. Intercity Transit anticipates the TRPC will award Intercity Transit approximately \$63,000. Staff added this project, **Sustainable Public Transportation - a Community Conversation**, to the 2016-19 TIP. The public participation requirement relative to this project is met through the TRPC process associated with their 2015 funding allocation and STIP programming. With this funding, Intercity Transit proposes to conduct research to capture data about riders, non-riders, potential users, and community attitudes. We need to determine how the Region uses our services, their level of satisfaction, and how we might improve within limited resources. This outreach, and the resultant analysis, will inform our short and long-range plans and provide direction regarding the elimination of service or how we might grow if the community supports that effort. Therefore, the following is added to the 2016-19 TIP:

- Sustainable Public Transportation - a Community Conversation Project

One additional project that was previously identified in the TIP for planning purposes in order to maintain a focus on it as a regionally significant project. The following project which is related to but goes beyond the UST project identified above does not as yet have a federal funding source identified:

- The Pattison Maintenance Facility Expansion Project.

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5) **Alternatives:**

- A. Adopt the 2016-19 TIP as recommended. This will meet our local requirement for Federal Transit Administration grant guidelines.
- B. Reject the programs. This will prevent or delay federal grant funding.

---

6) **Budget Notes:** The TIP is consistent with projects programmed in the current Intercity Transit 2014-19 Transit Development Plan.

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7) **Goal Reference:** The TIP process and project elements support agency goals: **Goal #1:** *"Assess the transportation needs of our community."* **Goal #4:** *"Provide responsive transportation options."*

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8) **References:** Exhibit 1 - **2016-2019 TIP.**

IT #	Project	2016	2017	2018	2019	TOTAL 2016-2019	Federal	Type	Local	Total	Fed %	Project Status
IT 1601	Capital Preventive Maintenance (TRPC & PSRC estimated apportionments)	\$5,653,500	\$5,766,570	\$5,881,901	\$5,999,539	\$23,301,511	\$18,641,209	Sec. 5307 IT Apportionment & PSRC Earned Share	4,660,302	23,301,511	80.0%	Planned & Secured 5307/5340
IT 1602	Construction Phase for Replacement of Underground Storage Tanks at Pattison Maintenance Facility with grading to meet expansion needs.	\$6,788,000				\$6,788,000	\$2,900,000	Sec. 5339 thru WSDOT and FHWA (STP) thru TRPC	3,888,000	6,788,000	42.7%	Secured funding pending. Applications in process.
IT 1603	Vanpool Vans - Replacement & Expansion (PSRC)	\$912,186	\$912,186	\$912,186	\$912,186	\$3,648,744	\$2,918,995	Sec. 5307 PSRC Earned Share	729,749	3,648,744	80.0%	Planned & Secured PSRC 5307 Earned Share
IT 1604	FHWA Transfer (TAP & CMAQ) Bus Stop Enhancements - including Tumwater Square	\$412,650	\$185,000	\$185,000	\$185,000	\$967,650	\$837,017	FHWA (TAP) transfer to FTA	130,633	967,650	86.5%	Planned FHWA funding 2016 forward. Applications in process.
IT 1605	FHWA Transfer (CMAQ &/or TAP) Walk-N-Roll Youth Transportation Education	\$39,000	\$39,000	\$39,000	\$39,000	\$156,000	\$134,940	FHWA (CMAQ in 2016) transfer to FTA	21,060	156,000	86.5%	Planned FHWA funding 2016 forward. Applications in process.
IT 1606	Vanpool & Fixed Route Operations (PSRC)	\$1,406,454	\$1,434,583	\$1,463,274	\$1,492,540	\$5,796,851	\$2,898,426	Sec. 5307 PSRC Earned Share	2,898,426	5,796,851	50.0%	Secured PSRC 5307 Earned Share
IT 1607	FHWA Transfer (CMAQ) • Sustainable Public Trans. – a Community Conversation	\$173,050				\$173,050	\$48,372	FHWA (TAP) transfer to FTA	124,678	173,050	28.0%	Planned FHWA funding 2016. Applications in process.
IT 1701	Replacement, heavy duty coaches - order in 2018-19 (PSRC)	\$0	\$4,140,446	\$887,500	\$887,500	\$5,915,446	\$4,732,357	Sec. 5307 PSRC Earned Share	1,183,089	5,915,446	80.0%	Secured PSRC 5307 Earned Share
Total Federal Funded Projects		\$15,384,840	\$12,477,785	\$9,368,861	\$9,515,765	\$46,747,252	\$33,111,315		\$13,635,936	\$46,747,252	70.8%	
Regionally Significant - Federal Funds Not Yet Identified												
IT #	Project	2016-2019				State	Type	Local	Total	Federal		Project Status
	Pattison Maintenance Facility Expansion			\$22,000,000			unknown	unknown	unknown	unknown		Regionally Significant RTIP Project Contingent on Securing Federal \$\$
<p><b>NOTE:</b> Grant type: Sec. 5307 &amp; PSRC* 5307 Earned Share - Urban area formula program administered by the Federal Transit Administration. Amount is determined by urban area population , population density, and NTD stats for revenue miles traveled. 5307 also has Small Transit Intensive Cities (5340) performance based funds rolled into the total. *Puget Sound Regional Council</p>												

# REVISED AGENDA

INTERCITY TRANSIT AUTHORITY

AGENDA ITEM NO. 7-B

MEETING DATE: June 3, 2015

**FOR:** Intercity Transit Authority  
**FROM:** Tammy Ferris, 705-5818  
**SUBJECT:** Bus Stop Pad Construction and Improvement Contract Award

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1) **The Issue:** Consideration of an award for the construction of bus stop pads.

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2) **Recommended Action:** Authorize the General Manager to enter into a contract for the construction of 27 bus stop pads with Asphalt Patch Systems, Inc., in the not-to-exceed amount of \$116,450, including taxes.

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3) **Policy Analysis:** The procurement policy states the Authority must approve any expenditure over \$25,000.

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4) **Background:** Intercity Transit issued a Request for Bids May 13, 2015. Interested contractors attended a pre-bid conference May 22, 2015.

The 2015 budget includes funding for bus stop enhancements to provide safety and accessibility, with funds designated for the construction of bus stop pads. The Stops and Zones Committee selected the pad locations based on criteria that prioritize sites for accessibility enhancements and shelter placement.

Two bids were received by the submittal deadline of 11:00 a.m. on May 29, 2015. Asphalt Patch Systems, Inc. was the low bidder and staff found all their bid documentation to be in order. References indicate the contractor is reputable and competent. This company also satisfactorily completed the stop pad construction project for Intercity Transit in 2014. Staff recommends award of contract to the lowest, responsive and responsible bidder, Asphalt Patch Systems, Inc.

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5) **Alternatives:**

A. Authorize the General Manager to enter into a contract for the construction of 27 bus stop pads with Asphalt Patch Systems, Inc., in the not-to-exceed amount of \$116,450, including taxes.

B. Defer action. Deferring action may result in missing the best weather for the outdoor construction.

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6) **Budget Notes:** Intercity Transit received \$160,000 in federal funds for this project with a \$25,000 local match. In addition, \$50,000 from the ADA Bus Stop Enhancements budget is being put towards this project for a total of \$235,000. These funds are programmed in the 2015 budget for engineering and construction services as well as the required shelters. Staff anticipates the project will be completed within budget.

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7) **Goal References:** **Goal #2:** *“Provide outstanding customer service.”* **Goal #3:** *“Maintain a safe and secure operating system.”* **Goal #4:** *“Provide responsive transportation options.”*

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8) **References:** N/A.

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**INTERCITY TRANSIT AUTHORITY**  
**AGENDA ITEM NO. 7-C**  
**MEETING DATE: June 3, 2015**

**FOR:** Intercity Transit Authority  
**FROM:** Ann Freeman-Manzanares 705-5838  
**SUBJECT:** Citizen Advisory Committee Reappointment

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1) **The Issue:** Whether to consider reappointment of one CAC member.

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2) **Recommended Action:**

A. Consider the reappointment of one current member to a term beginning July 1, 2015, through June 30, 2018: *Mitchell Chong* expressed interest in reappointment, has met attendance requirements, and is eligible for another three-year term.

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3) **Policy Analysis:** As per the Operating Principles, the Intercity Transit Authority appoints members to the Citizen Advisory Committee.

---

4) **Background:** There are currently five CAC positions that expire June 30, 2015. Three members are not eligible for reappointment having served two three-year terms: Valerie Elliott, Faith Hagenhofer, and Joan O'Connell. Two CAC members are eligible to seek reappointment for another three-year term: *Mitchell Chong and Dale Vincent*. Mr. Chong submitted a verbal request for reappointment. Mr. Vincent is not seeking reappointment.

On May 16, 2015, the Authority authorized staff to perform a recruitment in the fall instead of a spring recruitment. If Mr. Chong is reappointed, four positions will remain vacant until December 30, 2015.

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5) **Alternatives:**

- A. Reappoint Mitchell Chong to a term beginning July 1, 2015, ending June 30, 2018.
  - B. Direct staff to solicit applicants during the fall recruitment to fill this position.
- 

6) **Budget Notes:** N/A.

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7) **Goal References:** Appointment of members to the CAC assists in meeting all goals of the agency.

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8) **References:** N/A.

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**INTERCITY TRANSIT AUTHORITY  
AGENDA ITEM NO. 7-D  
MEETING DATE: June 3, 2015**

**FOR:** Intercity Transit Authority  
**FROM:** Ann Freeman-Manzanares, 705-5838  
**SUBJECT:** 2016 - 2021 Strategic Plan Policy Positions

- 
- 1) **The Issue:** Second review of policy issues for the 2016-2021 Strategic Plan.
- 
- 2) **Recommended Action:** Discuss and provide staff direction.
- 
- 3) **Policy Analysis:** The Strategic Plan is Intercity Transit's primary policy document and Authority direction determines the level of resources and priorities devoted to specific services and projects.
- 
- 4) **Background:** Every year the Authority defines critical policy issues and establishes direction for staff and the future of Intercity Transit. This typically takes place over several meeting sessions. This is the second of those meeting sessions.

Below is a list of policy issues to consider. Included is a short note regarding Authority direction for 2015 as well as new information the Authority may wish to consider. Staff will walk through these issues in more detail at the meeting.

1. **Should Intercity Transit maintain status quo service levels in 2016 or consider new or expanded local transit services needed to serve the growing population?**

*Authority Direction for 2015: While new or expanded local services are needed to serve our current population, our financial outlook necessitates a conservative approach. If state funding is approved, continue two grant-funded Express Routes - Tumwater to Lakewood and Olympia to Seattle.*

2. **What is Intercity Transit's role in providing regional mobility?**

*Authority Direction for 2015: Approach state and federal funding sources to provide assistance in meeting the public transportation demand in the 1-5 corridor. Continue support of the vanpool program and continue to work with our partners to consider alternatives for serving the corridor.*

3. **What role should Intercity Transit play in serving downtown Olympia, downtown Lacey and the Tumwater Town Center areas?**

*Authority Direction for 2015: Work with the state to identify adequate parking for the dash. Work with area stakeholders to market and cross promote transit in core areas of downtown*



*Olympia, Lacey, and Tumwater. Work with major employers and jurisdictions regarding parking, using commute alternatives and CTR plans.*

**4. Is there a role for local express service in the current service area?**

*Authority Direction for 2015: We currently do not offer local express service which operates in major corridors increasing service speeds by reducing the number of stops to reduce travel times. Continue to support transit signal prioritization. Monitor intra-county ridership related to the Tumwater to Lakewood and Olympia to Seattle service.*

**5. Should Intercity Transit seek alternative funding sources involving stakeholders in an extended dialogue to determine if a mutually acceptable strategy can be derived?**

*Authority Direction for 2015: Bring together community stakeholders in having a greater role in providing alternative funding for transit services rather than relying on federal funding. Request assistance from TRPC to facilitate a community conversation about the gap in regional expectations and available funds.*

**6. Should Intercity Transit's planning for the next six years be financially constrained?**

*Authority Direction for 2015: Consider an August 2015 sales tax election to levy the additional 0.1 percent with all revenues dedicated to capital. The 2015 State Legislature is considering an additional sales tax option for Intercity Transit. The Authority directed staff to hold on the August election date pending a decision. The issue was not resolved by the August election resolution filing date of May 8, 2015. The Authority needs to consider alternative direction.*

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5) **Alternatives:** N/A.

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6) **Budget Notes:** The Strategic Plan provides the basis for the development of the annual budget.

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7) **Goal Reference:** The strategic plan provides the basis for all our goals.

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8) **References:** Intercity Transit Strategic Plan 2015-2020.  
<http://www.intercitytransit.com/SiteCollectionDocuments/Strategic%20Plan%20Final%202015-2020.pdf>

**INTERCITY TRANSIT**  
Citizens Work Group  
*Charter*

**ARTICLE I - NAME OF GROUP**

The name of this Group shall be "Intercity Transit Citizens Work Group."

**ARTICLE II - PURPOSE**

The mission of the Intercity Transit (I.T.) Citizens Work Group, hereinafter referred to as CWG, is to advise the Authority concerning public transportation policy issues either raised by the CWG or referred to the CWG from the Authority.

The term "policy issues" includes issues related to Public Transportation Benefit Areas (PTBAs), the Transit Development Plan (TDP), other plans or service planning efforts of I.T., the agency's budget and programs of capital projects and operating services, and general operating practices of I.T.

The CWG will represent the interests of the community and assist I.T. staff and the Authority in fulfilling the agency's mission. I.T.'s mission is to enhance the quality of life for the people in our community by providing basic mobility and transportation alternatives.

**ARTICLE III - SCOPE OF WORK**

In the first year, the CWG shall:

- Review Intercity Transit's financial plan, including ballot measure issues, and provide feedback to the Transit Authority;
- Review the elements of the Transit Development Plan (TDP); identify methods to obtain public feedback; and work with staff to conduct a performance evaluation of the system from the customer's perspective;
- Review and update the American's With Disabilities Act (ADA) Paratransit Plan for Transit Authority approval;
- Develop a work plan for the second year, to present to the Transit Authority for approval; and
- Conduct a self evaluation after the first year to submit to the Transit Authority.

It is recognized during the first year, the CWG will require information regarding Intercity Transit. Staff will provide orientations to the CWG in specific areas including, but not limited to, services, policies, budget, strategic marketing plan; TDP; partnerships; ADA federal requirements; and community outreach practices.

## **ARTICLE VI - STAFFING**

As authorized by the Authority, the General Manager shall appoint a staff member to serve as the CWG Staff Liaison. The Staff Liaison shall acquire meeting facilities and equipment and distribute materials including the agenda. Other duties include preparation of agenda forms and attachments to communicate CWG issues and recommendations to Committees and the Transit Authority.

**ADOPTED:** This 5<sup>th</sup> day of April 2000.

**Resolution No. 02-00**

J:\Rhodelta\CWG\charter

**INTERCITY TRANSIT  
CITIZEN ADVISORY COMMITTEE  
*Operating Procedures***

**PURPOSE AND AUTHORITY**

To advise the Intercity Transit Authority (Authority) concerning public transportation policy issues and American's With Disabilities Act issues, either raised by the Citizen Advisory Committee (CAC) or referred to the CAC by the Authority. (*Amended 07/16/01*)

The term "policy issues" includes issues related to Public Transportation Benefit Areas (PTBAs), the Transit Development Plan (TDP), other plans or service planning efforts of Intercity Transit, the agency's budget and programs of capital projects and operating services, and general operating practices of Intercity Transit.

The CAC is advisory to the Authority, not the agency.

**COMPOSITION**

The CAC shall be comprised of no more than nineteen members appointed by the Intercity Transit Authority. Membership shall reflect Intercity Transit's service area. Representation from each of the following groups shall be sought:

- Senior Citizen(s)
- Persons with Disabilities
- Local College Student(s)
- Chambers of Commerce
- Business Representation (large and small)
- Service User(s) (fixed route, vanpool, DAL; Star Pass Holder)
- Youth
- City/State Transit Demand Management Coordinator(s)
- Social Service Agencies
- Medical Community
- Neighborhood Associations
- Rural Community
- Citizens-at-Large
- Native American
- Environmentalist
- Bicyclist

It is recognized a member may represent more than one of these groups. *(Amended 07/16/01; 12/20/04)*

### **TERMS**

CAC members shall serve a term of three years, and may serve two complete terms. If a member is appointed to complete a vacant term, it is not considered a complete term. *(Amended 07/16/01; 12/20/04)*

### **ATTENDANCE**

Any four unexcused absences in a 12-month period will result in forfeiture of the member's position on the CAC. The staff liaison will track attendance and a notification of membership forfeiture will automatically be sent to the respective member when four unexcused absences in a 12-month period occur. For an excused absence, members must notify the staff liaison prior to the meeting. A pattern of significant absences will be reviewed by the Chair of the Citizen Advisory Committee, hereinafter referred to as the "Chair". *(Amended 07/16/01; 12/16/02; 12/20/04)*

### **MEETING SCHEDULE**

Meetings will be held on the third Monday of each month, except for the months of January and February. January and February meetings will be held the second Monday of the month. All meetings shall be held at Intercity Transit's administrative offices, in the boardroom. Meeting length will be determined by the agenda. If issues relevant to the CAC are insufficient in number or substance, the meeting may be canceled with the agreement of the CAC Chair and Vice Chair. Members will be notified of the cancellation at least 24-hours in advance of a meeting. *(Amended 12/20/04)*

### **AGENDA**

The CAC Chair will determine the agenda in conjunction with the Staff Liaison. Any member wishing to add an item for substantive discussion at the meeting may do so by contacting the CAC Chair or Staff Liaison at least ten days prior to the meeting date. CAC members may add items to the agenda at the beginning of a meeting with the understanding, that depending on the requirement for additional information, such items may be discussed in a general way with substantive discussion and decision scheduled for a future meeting.

Staff Liaison shall mail the agenda to CAC members at least one week prior to the meeting.

## MINUTES

The Staff Liaison shall distribute a summary of the meeting. Verbatim transcripts and detailed documentation of discussion will not be available. Members will be asked to consider and approve the minutes for the record by majority vote. The minutes will include a list of all members present and absent.

## QUORUM

It is intended a quorum should be present at each meeting. One more than half of the current CAC members constitutes a quorum. If a quorum is not present, the meeting may still be held and any decisions made by members present will be forwarded to the Authority with a note indicating a quorum was not present at the vote. If a meeting starts with a quorum, the quorum requirement is considered met, even if members leave following the opening of the meeting. *(Amended 07/16/01)*

The CAC shall use Robert's Rules of Order as a guideline for conducting its business except as provided otherwise by State law or the operating procedures.

## OFFICERS/TERM OF OFFICE

Officers will consist of Chair and Vice Chair. The process for choosing officers shall consist of nomination in August (either self-nomination or nomination by others) and affirmation by majority vote in September. *(Amended 07/16/01)*

Officers will serve a term of one year and may serve up to two terms in the same office. If a CAC member completes an officer vacancy during the year, it shall not be considered against the two term limitation. A member may serve two years as Chair and two years as Vice Chair consecutively.

Officers may be removed prior to the end of term by majority vote of the CAC members. If an officer resigns or is removed prior to the end of the term, a replacement will be nominated and affirmed by majority vote. Such replacement will serve until the end of the regular term. *(Amended 07/16/01; 12/20/04)*

### Section 1.            Chair

The Chair shall:

- preside at all meetings;
- develop the agenda in coordination with the Staff Liaison;
- act as spokesperson for the CAC;
- attend the regular Authority meeting the 1<sup>st</sup> Wednesday of each month and provide reports to the CAC;

- provide leadership and direction for the CAC;
- appoint members to attend the Authority work sessions, who then report back to the CAC at their monthly meeting; and
- perform other duties as may be requested from time to time by the CAC or the Authority (*Amended 07/16/01*)

**Section 2. Vice Chair**

The Vice Chair, in the absence or inability of the Chair to serve, shall have the powers and shall perform the duties of the Chair. The Vice Chair shall perform such other duties from time to time as may be requested by the CAC or the Chair.

**Section 3. Authority Work Session Representation**

All members are expected to share the responsibility of representing the CAC at Authority work session. The Chair, working with the Staff Liaison shall seek CAC members to attend the monthly Authority work sessions. The CAC representative shall sit with Intercity Transit Authority members, participate fully in the meeting, and share the CAC's comments on respective issues. CAC representative(s) will serve at the work sessions in an advisory capacity to the Authority. (*Amended 07/16/01; 12/20/04*)

**MEETING PROTOCOL**

- *Presentations* made by staff or others should be succinct and relevant.
- *Discussion* of relevant issues and development of recommendations should constitute the majority following adequate briefing and presentation. All members' opinions will be respected and considered. The CAC may seek, at its discretion, input from the Authority and staff.
- *Agreement* on the CAC's position and recommendation to the Authority, prior to transmittal to the Authority, is the preferred method. Consensus is one method of agreement. (*Amended 2/19/01*)
- *Opposing positions will be shared with the Authority.*
- *Majority Vote* is considered a majority of members present. (*Amended: 12/20/04*)

**PRODUCTS**

It is anticipated the CAC will have a product in the form of a recommendation and/or a summary of the various points of view to the Authority following study and discussion of an issue. The recommendation and/or points of view will be forwarded to the Authority through the Staff Liaison, using the appropriate agenda forms and process. The CAC will seek Authority feedback regarding disposition of the recommendation and/or points of view. (*Amended 07/16/01*)

## SELF ASSESSMENT

The CAC will assess its accomplishments at least annually. Primary criteria may include:

- *Purpose:* Did the CAC stick to the purpose set forth above or did it stray into areas not relevant to the purpose or mission of Intercity Transit.
- *Usefulness:* Did the CAC transmit to the Authority relevant and meaningful recommendations.
- *Scope of Work:* Did the CAC achieve the various tasks and or consider Authority recommendations addressed during the previous evaluation and/or those requested throughout the year? If not, why? How did Intercity Transit and the community benefit from the results of the CAC's achievements?
- *Other:* Other criteria suggested by the CAC members may be used. (*Amended 07/16/01; February 14, 2005*)

## USE OF THE OPERATING GUIDELINES

The meeting protocol supersedes all other meeting procedures and will be used by the CAC until and unless it is amended by majority vote. Any such amendment will be recorded in the minutes and provided to the CAC members.

## AMENDMENTS

These operating principles may be amended by a majority vote of the Citizen Advisory Committee members at any meeting of the CAC. Copies of the proposed revisions or amendments must be provided to CAC and Authority members thirty days in advance of the meeting at which the changes are to be acted upon. (New Section Added 12/20/04)

**ADOPTED** this 17th day of July, 2000.

**Amended:** February 19, 2001  
July 16, 2001  
December 16, 2002  
December 20, 2004  
February 14, 2005

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*INTERCITY TRANSIT AUTHORITY*

*BYLAWS*

# INTERCITY TRANSIT AUTHORITY BYLAWS

- I. BACKGROUND
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- IX. GENERAL PROVISIONS**
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  - 9.4 Deposits**
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  - 9.7 Repealer**

**X. AMENDMENTS**

# INTERCITY TRANSIT AUTHORITY

## BYLAWS

### I. BACKGROUND

Intercity Transit is the public transportation agency serving all territory within the boundaries of the cities of Olympia, Lacey, Tumwater, and Yelm, and includes the following voting precincts in unincorporated Thurston County, as they existed on April 4, 2002: 38, 43, 56, 58-59, 68- 70, 75, 78-79, 81-85, 87, 90-93, 97-98, 100, 107-108, 110, 112-115, 117-121, 123, 139, 136, 142-143, 159, 161-163, 167-169, 174, 177-178, 181, 186-199, 193-194, 196-197 and portions of some voting precincts (See Public Transportation Improvement Conference Resolution dated April 4, 2002). (Res. 1-03)

During the summer of 1980, representatives from the jurisdictions comprising the Intercity Transit service area met and formally established the Thurston County Public Transportation Benefit Area as a municipal corporation under the laws of the State of Washington (RCW 36.57A). In September, voters approved an initiative allowing for the collection of a sales tax to support public transportation, and on January 1, 1981, the Thurston County Public Transportation Benefit Area assumed operation of local transit service. On April 16, 1982, the Thurston County Public Transportation Benefit Area officially changed its name to Intercity Transit. (Res. 2-06)

On May 19, 1992, the voters in the non-urbanized areas of Thurston County voted to expand the transit district county-wide and levied a sales and use tax at the rate of three-tenths of one percent (.003). (Res. 2-93)

On April 4, 2002, the duly-called Public Transportation Improvement Conference voted to approve a resolution reducing the boundaries of the Thurston County Public Transportation Benefit Area to the area described in the first paragraph above. (Res. 06-02; Res. 1-03)

On September 17, 2002, the voters within the boundary of the Thurston County Public Transportation Benefit Area voted to approve an increase in sales and use tax from three-tenths of one percent (.003) to six-tenths of one percent (.006). (Res. 1-03)

## II. NAME/OFFICES

The name of the public transportation area, duly established pursuant to the laws of the State of Washington, shall be Intercity Transit, the governing Board of Directors of which shall be called the Intercity Transit Authority, and shall be located at 526 Pattison SE, Olympia, Washington. The Intercity Transit Authority may establish such other offices, within Thurston County, as the Authority may determine necessary from time to time. (Res. 29-82; Res. 2-93; Res. 2-06)

## III. POWERS, RIGHTS, RESPONSIBILITIES

The Authority shall be responsible for establishing and monitoring the policies of Intercity Transit, its budget and its service levels. The Authority shall appoint and oversee the performance of the General Manager of Intercity Transit. Nothing in these bylaws is intended to limit the general powers of the Authority; the Authority retains all powers granted to it under the laws of the State of Washington. (Res. 03-2007)

## IV. AUTHORITY COMPOSITION

**4.1 Composition.** The Authority will consist of a governing board of eight (8) voting members and one (1) nonvoting member set forth as follows: (Res. 5-2010)

Five (5) elected members. A member of the county legislative authority, one elected official each from the Cities of Olympia, Lacey, Tumwater and Yelm.

Three (3) citizen representatives. Three citizens selected by the full Authority from citizens of recognized fitness for such positions, who reside within the boundaries of the Thurston County Public Transportation Benefit Area. (Res. 2-93; Res. 6-02).

One (1) nonvoting member recommended or selected in accordance with RCW 36.57A.050. (Res. 5-2010)

**4.2 Selection - Elected Members.** The five elected voting members of the Authority shall serve at the pleasure of appointing jurisdictions and shall hold office for a term determined by the appointing body. (Res. 2-93; Res. 6-02; Res. 5-2010).

**4.3 Selection - Citizen Representatives.** The three voting citizen representatives shall each be appointed by a majority vote of the Authority for a term of three calendar years (the original members having been appointed, so that one term expired at the end of each succeeding calendar year for three years, subsequent to the initial appointments) and an appointment for a three-year term

shall be made annually to fill an expiring term. Citizen representatives shall have full voting membership on the Authority. (Res. 5-2010)

Any citizen member may be removed for cause upon a majority vote of the Authority. Upon a vacancy in a position by death, resignation or other cause, a new member will be appointed for the unexpired portion of the term, upon a majority vote of the Authority. Upon the expiration of either a partial term or the first full term of a citizen representative position, the Authority may, by a majority vote, reappoint the citizen representative for a full three-year term, provided that a citizen representative shall not be appointed to more than three consecutive full three-year terms.

No later than its regular September meeting, the Authority will review the status of the expiring citizen representative position. The Authority may, by a majority vote, either: (Res. 2-06)

- 1) reappoint the incumbent for an additional three-year term,
- 2) open the position for the purpose of soliciting and receiving applications from interested citizens, or appoint an interested citizen from a list maintained for that purpose.

Should the Authority decide to open the position, the position opening will be advertised through the community with applications accepted until two weeks prior to the regular November meeting. At its November meeting, the Authority will choose an appropriate number of applicants as finalists to be interviewed by the Authority for the purpose of making a final selection which will be made before the end of the year. In the event a selection is not made by December 31, the incumbent shall serve until a replacement is named. (Res. 49-83, 79-86, 94-89, 4-91).

## V. MEETINGS

**5.1 Regular Meetings.** All meetings of the Authority shall be open to the public except to the extent that executive sessions are authorized by law. Regular meetings of the Authority will be held once each month at its designated offices at a time and date established by resolution. (Res. 84-87; Res. 85-87; Res. 90-88)

**5.2 Special Meetings.** Special meetings may be called at any time by the Chair or by a majority of the whole Authority, provided each member receives personally, or by mail, written notice of the date, time, place of the meeting, and the matters to be taken up at the meeting at least 24 hours in advance.

**5.3 Executive Sessions.** Executive sessions may be held during a regular or special meeting for the purposes listed in RCW 42.30.110. Before convening in executive session, the Chair shall publicly announce the purpose for the executive session, the time when the executive session will be concluded, and the Chair will announce whether the nonvoting member will be excluded, consistently with RCW 36.57A.050. The executive session may be extended to a stated later time by announcement of the Chair. (Res. 5-2010)

**5.4 Work Sessions.** The Authority shall meet to conduct work sessions. The work sessions shall be open to the public except to the extent that executive sessions are authorized by law. Work sessions of the Authority will be held once each month at its designated offices at a time and date established by resolution. (Res. 05-2001)

**5.5 Public Hearings.** Public hearings may be scheduled by the Authority at such times and at such places as the Authority determines to be appropriate to specifically solicit public comment on certain issues. Such issues may include, but are not necessarily limited to, the following:

- a change in any transit fare;
- a substantial change in transit service;
- presentation of the annual budget;
- Federal Transit Administration grant applications;
- Transportation Improvement Program;
- American's With Disabilities Act Plan Update;
- updates on the six year Transit Development Plan;
- environmental impact reviews.

Public notice shall be given at least two weeks in advance, unless otherwise required by Federal or State regulations. (Res. 2-93; Res. 1-96)

**5.6 Meeting Notices.** Notices of changes in the time or place of regular meetings, work sessions, or the call for a special meeting or public hearing, will be provided to the official local newspaper of general circulation and to any publications or radio or television stations which have on file with the Clerk of the Board a written request to be so notified.

Such call or notice shall be delivered personally or by mail at least 24 hours in advance of the meeting and shall specify the time and place of the meeting and the business to be transacted, provided that notice be given at least two weeks in advance of public hearings, unless otherwise required. (Res. 1-96; Res. 05-2001)

The Olympian is designated as the official newspaper of the Authority for the purpose of publication of legal notices and dissemination of public information announcements.

**5.7 Quorum.** At all meetings of the Authority, five voting members shall constitute a quorum for the transaction of business. (Res. 5-2010)

**5.8 Chair.** The Chair shall open and preside at all meetings of the Authority. In the event of the Chair's absence or inability to preside, the Vice Chair shall assume the duties of presiding over the meetings of the Authority; provided, however, if the Chair is to be permanently unable to preside, the Authority shall select a new Chair for the remainder of the Chair's term. In the absence of both the Chair and Vice Chair, the voting member having served on the Authority the longest shall serve as acting Chair. (Res. 5-2010)

**5.9 Conduct of Meetings.** Unless otherwise governed by the provisions of these Bylaws, the laws of the State of Washington or Authority resolution, Roberts Rules of Order (newly revised) shall govern the conduct of Authority meetings. It is the intent of the Authority to conduct the business in an open environment consistent with the State Open Public Meetings Act.

**5.10 Order of Business and Agenda.** The order of business at regular meetings, work sessions, and special Authority meetings shall be established on a meeting-by-meeting basis according to the issues requiring discussion in any particular month. Prior to any meeting of the Authority, the Clerk of the Authority and the General Manager will confer with the Chair on items of discussion. The Clerk will prepare a written agenda including appropriate attachments and will distribute to all members as soon as possible prior to the meeting, but not less than 48 hours before the meeting. (Res. 02-93; Res. 05-2001; Res. 03-2007)

**5.11 Voting/Authority Decisions.** Every voting member of the Authority shall be entitled to one vote on all issues before the Authority; the nonvoting member is entitled to no vote. All voting members present may vote or abstain; an abstention shall be recorded but not be counted. The act of the majority of the voting members present at a meeting at which a quorum is present shall be the act of the Authority, unless a greater number is required by law. The majority vote must have at least three affirmative votes in order to be an Authority decision. Any member may require that the vote of each member on a particular matter be recorded in the minutes, in which case a roll call will be taken. (Res. 94-89; Res. 2-06; Res.5-2010).

**5.12 Meeting Minutes.** The proceedings of all Authority meetings, work sessions, and public hearings shall be recorded and maintained and shall contain



an accurate accounting of the Authority's official action with reference to all matters properly before it and any public comments made. Minutes of the meetings shall be provided to each Authority member as soon as practicable following each meeting.

The official copy for each meeting shall be approved by the Authority, signed by the Chair and Clerk of the Board and shall become part of the permanent records file, maintained by the Clerk. (Res. 05-2001)

**5.13 Resolutions.** The Authority may require certain action be documented by way of a formal resolution, which shall be prepared by the Clerk of the Board, and once approved by the Authority, shall be signed by the Chair and Clerk. The resolution will be numbered, dated, incorporated in the minutes, and made part of the permanent records file. (Res. 2-06)

**5.14 Compensation.** Voting and nonvoting members of the Authority shall not be compensated for meeting attendance. Any change to Section 5.13, Compensation, of the Intercity Transit Authority bylaws shall require a two-thirds majority vote by the Authority. (Res. 20-81; Res. 63-84; Res. 2-93; Res. 2-98; Res. 4-99; Res. 6-02; Res. 5-2010).

**5.15 Attending Meetings Remotely.** While adhering to the Open Public Meetings Act, RCW 42.30, Authority members may attend regular, work session, special meetings and executive sessions via teleconference, if they are unable to attend in person. This requires that all those attending the meeting in person must be able to clearly hear the members who are attending remotely.

Member's requiring remote attendance shall provide staff with at least 2 day's notice to allow for reasonable accommodation.

The Chair and Vice Chair may attend remotely; however, they will not be able to preside over the meeting remotely. In the event the Chair and Vice Chair must attend the meeting remotely concurrently, the voting member having served on the Authority the longest shall serve as acting Chair.

Remote attendance shall constitute attendance for quorum purposes and voting. Prior to the start of any meeting in which a member is attending remotely, the presiding Chair or Vice Chair will announce the guidelines for how members attending remotely will be included in making motions, amendments, etc.

## **VI. OFFICERS - CHAIR AND VICE CHAIR**

**6.1 Election.** The Chair and Vice Chair shall be voting members of the Authority elected by the voting members by majority vote at a regular or special meeting of the Authority. (Res. 5-2010)

**6.2 Term.** The Chair and Vice Chair shall be elected from among the voting members at the first meeting in February of each year. In the event either position becomes vacant, the voting members shall elect a new officer at the next regular meeting to serve until the next February meeting. (Res. 1-91; Res. 5-2010)

**6.3 Duties.** In addition to the powers and duties granted by these Bylaws, the Chair shall have such other powers and duties as shall be prescribed by law or by resolution of the Authority.

In the absence of the Chair, the Vice Chair shall perform the duties of the Chair, and when so acting, shall have all the powers of and be subject to all the restrictions upon the Chair. The Vice chair shall perform other duties as may be assigned to him or her by the Chair or by the Authority. In the absence of the Chair and Vice Chair, the most senior member of the Authority in attendance shall perform the duties of the Chair, and when so acting, shall have all the powers of and be subject to all the restrictions upon the Chair. (Res. 2-93; Res. 1-96)

## **VII. COMMITTEES**

**7.1 Authority Committees.** In order to better facilitate the work of the Authority, the Authority may establish standing and/or ad hoc committees to address specific issues. Each committee shall be composed of not more than four Authority members. Committee Chairs and committee members shall be designated by the Authority Chair, subject to the confirmation by the full Authority. To the extent possible, committee reports to the full Authority shall be in writing.

Terms of standing committees will coincide with the terms of the Authority officers (which recommence annually in February), at which time the Authority will review the responsibilities of the committees. In the event that new committee assignments are not made at the time Authority officers are elected, the incumbent committee members shall serve until replacements are appointed. (Res. 61-84; Res. 76-86; Res. 1-91; Res. 2-93).

**7.2 Special Appointments.** The Chair may appoint Authority members to special intra- and interagency committees and councils as appropriate.

These special appointments will be reviewed annually to coincide with the terms of the Authority officers and the review of Authority committees.

## VIII. APPOINTED POSITIONS

**8.1 General Manager.** The Authority shall appoint a General Manager who shall be responsible for the executive and administrative functions of Intercity Transit and who shall have such power and perform such duties as shall be prescribed by law and action of the Authority. (Res. 1-96; Res. 03-2007)

**8.2 Legal Counsel.** Principal Legal Counsel shall be appointed by and shall serve at the pleasure of the Authority.

**8.3 Clerk of the Board.** The General Manager recommends appointment of a Clerk of the Board and the Authority takes official action on the appointment. The Clerk of the Board shall have such power and perform such duties as prescribed by law or action of the Authority. (Res. 1-96; Res. 2-06)

## IX. GENERAL PROVISIONS

**9.1 Warrants.** All disbursements of Intercity Transit shall be by warrant drawn by the appropriate administrative director as per Authority resolution or as otherwise directed by law. All requests for warrants shall be signed as directed by Authority resolution. (Res. 68-85; Res. 75-86).

**9.2 Notes.** All notes or other evidence of indebtedness, including bills issued or incurred in the name of Intercity Transit shall be signed by such officer, member, agent or employee of Intercity Transit, and in such manner as shall from time to time to be determined by Authority resolution.

**9.3 Other Legal Documents.** The Authority may authorize any officer or officers, agent or agents of Intercity Transit, in addition to the officers so authorized by resolution, to enter into any contract or execute and deliver any instrument in the name of and on behalf of Intercity Transit and such authorization may be general or may be confined to specific instances. All written contractual obligations of Intercity Transit, including, but not limited to, contracts, leases and assignments, are to be maintained by the General Manager or designee. (Res. 2-93; Res. 1-96)

**9.4 Deposits.** All funds of Intercity Transit shall be deposited in the appropriate account established by resolution. The appropriate director shall be custodian of the funds and is, subject to approval by Authority resolution, authorized to invest such funds in the manner provided by law. (Res. 1-96)

**9.5 Gifts.** The Authority may accept on behalf of Intercity Transit any contribution, gift, or bequest (so long as conditions are consistent with state law), for any purpose of Intercity Transit.

**9.6 Travel.** Members of the Authority, in order to properly and fully conduct official Intercity Transit business, may travel and incur expenses. Overnight travel by Authority members will be approved in advance by the Authority or authorized by the Chair subject to annual budget restraints. Authority members will receive reimbursement for reasonable expenses incurred while engaged in out-of-county official business, in accordance with RCW 36.57A.050 and the adopted travel policy which applies to all Intercity Transit employees. (Res. 62-84, 94-89, 2-93, Res. 1-96; Res. 6-02)

**9.7 Repealer.** These bylaws, as established by resolution, shall supersede all prior resolution in conflict herewith.

**X. AMENDMENTS**

These bylaws may be amended by a majority vote of the voting members at any regular or special meeting of the Authority, provided that copies of the proposed revisions or amendments shall have been made available to each Authority member as part of the agenda of the meeting at which proposed revisions or amendments are to be acted upon. These bylaws are adopted by Authority resolution, therefore, any amendments hereto shall be by that same instrument. (Res. 2-06; Res. 5-2010)

ADOPTED: July 24, 1987

Amended:	April 5, 1989	(Res. 94-89)	May 2, 2001	(Res. 5-2001)
	May 3, 1989	(Res. 95-89)	May 15, 2002	(Res. 6-2002)
	March 6, 1991	(Res. 1-91)	February 5, 2003	(Res. 1-2003)
	September 4, 1991	(Res. 4-91)	March 1, 2006	(Res. 2-2006)
	March 3, 1993	(Res. 2-93)	June 6, 2007	(Res. 3-2007)
	February 7, 1996	(Res. 1-96)	June 16, 2010	(Res. 5-2010)
	September 2, 1998	(Res. 2-98)	March 4, 2015	(Res. 1-2015)
	June 2, 1999	(Res. 4-99)		

## Leadership Attributes of a Highly Effective Board Member

5/23/06

- 1) High integrity.
- 2) Engage fully in board process.
- 3) Mission driven - be clear about your commitment to Intercity Transit.
- 4) Be respectful of peers, Intercity Transit staff and community.
- 5) Never make this about "me" - diminish your self-importance.
- 6) Dress and present yourself to others in a professional manner.
- 7) Continually educate yourself on Intercity Transit subjects.
- 8) Citizen Representatives need to provide ears and eyes on the streets.
- 9) Regularly review customer service complaints.
- 10) Come to meetings and be prepared.
- 11) Dare to question the issues and take risks.
- 12) Think outside of your own personal box. Work to get into the shoes of others on the board.
- 13) Listen to staff, public and have their priorities right.
- 14) Respect the agendas of each jurisdiction.
- 15) Strive for honesty.
- 16) Support clear, timely decision making.
- 17) Come with a vision of what you think should be and what needs doing. We need to steer and push the boat.
- 18) Be patient with others as you express your passion and knowledge.
- 19) Support consensus.

## Expectations of Intercity Transit Board Chair

- 1) Be at the meetings.
- 2) Run an effective meeting.
- 3) Proactively plan board agendas, own them, and stick by the agenda. Don't surprise the board.
- 4) Soliciting diverse ideas of Board members and the public in a respectful manner.
- 5) Don't take action at the same meeting that the public provides input.
- 6) Be willing to make decisions in a fair and predictable manner. Remain neutral when facilitating decisions.
- 7) Be a supportive, faithful and accurate spokesperson for decisions and policies made by the Intercity Transit Board.
- 8) Stay informed of the key Intercity Transit issues, be involved with them, and track progress.
- 9) Clearly define expectations of Manager and ensure appropriate responses to requests.
- 10) Articulate how they will work with the team to achieve strong results.
- 11) Help members think about things in a different way.
- 12) Support the Board getting more engaged in community leadership.
- 13) Make sure that all members are heard and treated in a considerate manner- facilitate effective dialogue.
- 14) Share information from the political realm and land use planning.
- 15) Be clear when he/she is speaking for his/her ideas vs. facilitating a decision.
- 16) Needs to work with challenging relationships that occur with Board members and ensure timely resolution of interpersonal conflicts.
- 17) Principle contact with General Manager and Board Secretary.
- 18) Sensitive to quorum – let's others speak first and summarizes.
- 19) Will initiate subjects when they choose - not just the facilitator for others ideas.
- 20) Work to energize the board and build commitment.
- 21) Let team members speak without competition and summarize what was said.

## **Expectations of Board Vice-Chair**

- 1) Be part of the executive team - Chair, Vice, and Executive Manager.
- 2) Regularly attend meetings.
- 3) Contribute ideas to decision making- don't just listen.
- 4) Be ready to fill in for the Chair.
- 5) Head up ad hoc committees.
- 6) Use as alternate. Ask them to take leadership within a sphere.
- 7) Work with Chair in setting the direction of the organization.
- 8) Role is to understudy the Chair and be prepared to handle the Chair role when needed. Support a smooth transition if necessary.
- 9) Maintain the consistency of the flow of the Board. Speak out as a member, speaking their mind.

# INTERcity TRANSIT

## OPERATING PRINCIPLES INTERCITY TRANSIT AUTHORITY

APPROVED: July 2003

REVISED: May 6, 2005; June 7, 2006; May 11, 2007

REVIEWED: April 17, 2009

REVIEWED: May 14, 2010

**Our mission is to provide and promote transportation choices that support an accessible, sustainable, livable, healthy, prosperous community.**

### We Value:

- Personal accountability
- Honesty and candor
- Creativity
- Ownership
- Diversity of opinion
- Integrity
- Public input
- Leadership
- Respect
- Cooperation
- Trust
- Humor

### **The principles by which we work together are:**

1. We come to meetings on time, prepared, and with an open mind for informed dialogue.
2. We are engaged advocates for public transportation and the Intercity Transit Authority Vision.
3. We demonstrate respect and civility in all of our actions.
4. We will not undermine the Authority's decisions, while we recognize individual members may not always agree with decisions.
5. The Chair is our communication point person.
6. We always keep Executive Sessions confidential.
7. We are committed to a process that allows workable, cost-effective and creative outcomes.
8. We strive for cooperation and believe reasonable people can disagree.
9. We help each other be leaders by encouraging integrity, accountability, and confidence.
10. We agree to nurture positive relations with each other through active listening, clear concise communication and by providing prompt non-judgmental feedback.
11. We agree to address interpersonal conflicts promptly.
12. We will be clear when giving direction to staff.



**Decision Authority  
January 2004**

<b>Decision</b>	<b>ITA</b>	<b>GM</b>	<b>Shared</b>	<b>Discussion</b>
<b>Procurement – Over \$25,000</b>	<b>X</b>			Procurements over \$25,000 except general operating supplies (such as fuel) require ITA approval. ITA recommends review – consider something higher than \$25,000 – many other entities have a \$100,000 threshold.-
<b>Procurement – Under \$25,000</b>		<b>X</b>		GM serves as the agency’s purchasing agent and may award and execute contracts up to \$25,000. ITA would like to have this reviewed with consideration for increasing the \$ amount.
<b>Procurement – General Operating Supplies</b>		<b>X</b>		GM may award and execute contracts for general operating supplies even if the cost exceeds \$25,000.
<b>Collective Bargaining Agreements</b>			<b>X</b>	The ITA approves the collective bargaining agreements. The ITA’s approval or disapproval is limited to the agreement in its entirety and not individual elements of the agreement. The GM is the leader of negotiations on agreements.
<b>Personnel Policy</b>	<b>X</b>			ITA adopts personnel policies by resolution.
<b>Hiring/Firing of General Manager</b>	<b>X</b>			The ITA hires and fires the General Manager of the agency.
<b>General Manager Annual Performance Evaluation</b>	<b>X</b>			The ITA conducts an annual evaluation of the performance of the GM and establishes annual goals.
<b>ITA Goals</b>	<b>X</b>			The ITA establishes annual goals for the Authority and self-evaluates performance of these goals.
<b>Appointment of Citizen Work Group Members</b>	<b>X</b>			The ITA conducts a recruitment process annually for CWG members and makes

				appointments to the CWG. They adopt guidelines for the operation of the CWG.
<b>Citizen Representatives</b>	X			The ITA conducts recruitment processes for the Citizen Representative position when there is a vacancy. They are responsible for conducting interviews and making an official appointment. They may also re-appoint current Citizen Representatives to these positions per the ITA Bylaws.
<b>Annual Reorganization Meeting</b>	X			The ITA conducts a re-organizational meeting each February. At this respective meeting, they elect officers, make committee assignments, appoint Pension Committee staff positions, and review their bylaws if deemed necessary.
<b>Personnel, Hiring &amp; Discipline</b>		X		The GM hires, disciplines and evaluates employees and administers personnel policies. Employees cannot appeal decisions of the GM to the ITA.
<b>Classification &amp; Compensation Plan</b>	X			The GM makes recommendation to the ITA regarding amendments or revisions to the plan; the ITA approves changes.
<b>New Positions</b>	X			The ITA approves new positions as part of the annual budget approval. If new positions are recommended outside the budget process, the ITA makes approval. ITA recommends this process be re-evaluated to give the GM this authority as along as the budget is not increased.
<b>Transit Development Plan</b>	X			ITA adopts a 6-year plan on an annual basis.
<b>Budget</b>	X			The ITA adopts the annual budget by resolution. ITA approves budget amendments if the budget will exceed the original adopted amount.
<b>Budget Administration</b>		X		The GM is responsible for budget administration. The GM seeks ITA

				approval if overall expenditures will exceed the original amount approved. Budget adherence is reviewed quarterly with the ITA.
<b>Budget Amendment</b>	X			The ITA approves, by resolution, any amendment which increases the overall operating budget.
<b>Fare Structure</b>	X			The ITA adopts the fare structure and fare policy, by resolution. The ITA reviews fares at least every 3 years.
<b>Wages &amp; Benefits</b>	X			The ITA approves wage and benefit changes through adoption of the annual budget, approval of collective bargaining agreements, and amendments of the Personnel Policy Manual.
<b>Retirement Plans</b>	X			The Authority approves employee retirement plans and/or changes to existing plans by resolution. I.T. currently has a 401(k) and 457 Plan, along with PERS Plans.
<b>Cafeteria Plan</b>	X			By resolution, the ITA approves the Cafeteria Plan and/or changes to the plan offered to employees.
<b>Legal Counsel</b>	X			The ITA approves the legal counsel contract. Legal Counsel serves the ITA.
<b>Interlocal Agreements</b>	X			The ITA approval any interlocal agreements between I.T. and other jurisdictions.
<b>Bylaws</b>	X			The ITA approves changes to their bylaws by resolution.
<b>Drug &amp; Alcohol Policy</b>			X	The ITA approves changes to the D&A policy by resolution, as required by the FTA. The GM develops and implements procedures and guidelines as may be required to administer and enforce the policy.

# INTERCITY TRANSIT AUTHORITY GOALS

**Goal 1: Assess the transportation needs of our community throughout the Public Transportation Benefit Area.**

*Ends Policy: Intercity Transit Authority, staff, and the public will have access to clear and comprehensive information related to the transportation needs of our Public Transportation Benefit Area.*

**Goal 2: Provide outstanding customer service.**

*Ends Policy: Customers will report high level of satisfaction with the services provided.*

**Goal 3: Maintain a safe and secure operating system.**

*Ends Policy: All Intercity Transit customers, employees, and facilities will be assured safety and security.*

**Goal 4: Provide responsive transportation options within financial limitations.**

*Ends Policy: Customers and staff will have access to programs and services that benefit and promote community sustainability.*

**Goal 5: Align best practices and support agency activities and sustainable technologies.**

*Ends Policy: Resources will be used efficiently with minimal impact on the environment.*

**Goal 6: Encourage use of services.**

*Ends Policy: Educate and encourage community members to explore and appreciate the benefits of public transportation.*

**INTERCITY TRANSIT  
CITIZEN ADVISORY COMMITTEE**  
*Operating Procedures*

**PURPOSE AND AUTHORITY**

To advise the Intercity Transit Authority (Authority) concerning public transportation policy issues and American's With Disabilities Act issues, either raised by the Citizen Advisory Committee (CAC) or referred to the CAC by the Authority. (*Amended 07/16/01*)

The term "policy issues" includes issues related to Public Transportation Benefit Areas (PTBAs), the Transit Development Plan (TDP), other plans or service planning efforts of Intercity Transit, the agency's budget and programs of capital projects and operating services, and general operating practices of Intercity Transit.

The CAC is advisory to the Authority, not the agency.

**COMPOSITION**

The CAC shall be comprised of no more than nineteen members appointed by the Intercity Transit Authority. Membership shall reflect Intercity Transit's service area. Representation from each of the following groups shall be sought:

- Senior Citizen(s)
- Persons with Disabilities
- Local College Student(s)
- Chambers of Commerce
- Business Representation (large and small)
- Service User(s) (fixed route, vanpool, DAL; Star Pass Holder)
- Youth
- City/State Transit Demand Management Coordinator(s)
- Social Service Agencies
- Medical Community
- Neighborhood Associations
- Rural Community
- Citizens-at-Large
- Native American
- Environmentalist
- Bicyclist

It is recognized a member may represent more than one of these groups. (*Amended 07/16/01; 12/20/04*)

## **TERMS**

CAC members shall serve a term of three years, and may serve two complete terms. If a member is appointed to complete a vacant term, it is not considered a complete term. (*Amended 07/16/01; 12/20/04*)

## **ATTENDANCE**

Any four unexcused absences in a 12-month period will result in forfeiture of the member's position on the CAC. The staff liaison will track attendance and a notification of membership forfeiture will automatically be sent to the respective member when four unexcused absences in a 12-month period occur. For an excused absence, members must notify the staff liaison prior to the meeting. A pattern of significant absences will be reviewed by the Chair of the Citizen Advisory Committee, hereinafter referred to as the "Chair." (*Amended 07/16/01; 12/16/02; 12/20/04*)

## **MEETING SCHEDULE**

Meetings will be held on the third Monday of each month, except for the months of January and February. January and February meetings will be held the second Monday of the month. All meetings shall be held at Intercity Transit's administrative offices, in the boardroom. Meeting length will be determined by the agenda. If issues relevant to the CAC are insufficient in number or substance, the meeting may be canceled with the agreement of the CAC Chair and Vice Chair. Members will be notified of the cancellation at least 24-hours in advance of a meeting. (*Amended 12/20/04*)

## **AGENDA**

The CAC Chair will determine the agenda in conjunction with the Staff Liaison. Any member wishing to add an item for substantive discussion at the meeting may do so by contacting the CAC Chair or Staff Liaison at least ten days prior to the meeting date. CAC members may add items to the agenda at the beginning of a meeting with the understanding, that depending on the requirement for additional information, such items may be discussed in a general way with substantive discussion and decision scheduled for a future meeting.

Staff Liaison shall mail the agenda to CAC members at least one week prior to the meeting.

## MINUTES

The Staff Liaison shall distribute a summary of the meeting. Verbatim transcripts and detailed documentation of discussion will not be available. Members will be asked to consider and approve the minutes for the record by majority vote. The minutes will include a list of all members present and absent.

## QUORUM

It is intended a quorum should be present at each meeting. One more than half of the current CAC members constitutes a quorum. If a quorum is not present, the meeting may still be held and any decisions made by members present will be forwarded to the Authority with a note indicating a quorum was not present at the vote. If a meeting starts with a quorum, the quorum requirement is considered met, even if members leave following the opening of the meeting. *(Amended 07/16/01)*

The CAC shall use Robert's Rules of Order as a guideline for conducting its business except as provided otherwise by State law or the operating procedures.

## OFFICERS/TERM OF OFFICE

Officers will consist of Chair and Vice Chair. The process for choosing officers shall consist of nomination in October (either self-nomination or nomination by others) and affirmation by majority vote in November. *(Amended 07/16/01; 07/06/16)*

Officers will serve a term of one year and may serve up to two terms in the same office. If a CAC member completes an officer vacancy during the year, it shall not be considered against the two term limitation. A member may serve two years as Chair and two years as Vice Chair consecutively.

Officers may be removed prior to the end of term by majority vote of the CAC members. If an officer resigns or is removed prior to the end of the term, a replacement will be nominated and affirmed by majority vote. Such replacement will serve until the end of the regular term. *(Amended 07/16/01; 12/20/04)*

### Section 1. *Chair*

The Chair shall:

- preside at all meetings;
- develop the agenda in coordination with the Staff Liaison;
- act as spokesperson for the CAC;
- attend the regular Authority meeting the 1<sup>st</sup> Wednesday of each month and provide reports to the CAC;

- provide leadership and direction for the CAC;
- appoint members to attend the Authority work sessions, who then report back to the CAC at their monthly meeting; and
- perform other duties as may be requested from time to time by the CAC or the Authority *(Amended 07/16/01)*

## **Section 2. Vice Chair**

The Vice Chair, in the absence or inability of the Chair to serve, shall have the powers and shall perform the duties of the Chair. The Vice Chair shall perform such other duties from time to time as may be requested by the CAC or the Chair.

## **Section 3. Authority Work Session Representation**

All members are expected to share the responsibility of representing the CAC at Authority work session. The Chair, working with the Staff Liaison shall seek CAC members to attend the monthly Authority work sessions. The CAC representative shall sit with Intercity Transit Authority members, participate fully in the meeting, and share the CAC's comments on respective issues. CAC representative(s) will serve at the work sessions in an advisory capacity to the Authority. *(Amended 07/16/01; 12/20/04)*

## **MEETING PROTOCOL**

- *Presentations* made by staff or others should be succinct and relevant.
- *Discussion* of relevant issues and development of recommendations should constitute the majority following adequate briefing and presentation. All members' opinions will be respected and considered. The CAC may seek, at its discretion, input from the Authority and staff.
- *Agreement* on the CAC's position and recommendation to the Authority, prior to transmittal to the Authority, is the preferred method. Consensus is one method of agreement. *(Amended 2/19/01)*
- *Opposing positions will be shared with the Authority.*
- *Majority Vote* is considered a majority of members present. *(Amended: 12/20/04)*

## **PRODUCTS**

It is anticipated the CAC will have a product in the form of a recommendation and/or a summary of the various points of view to the Authority following study and discussion of an issue. The recommendation and/or points of view will be forwarded to the Authority through the Staff Liaison, using the appropriate agenda forms and process. The CAC will seek Authority feedback regarding disposition of the recommendation and/or points of view. *(Amended 07/16/01)*



## SELF ASSESSMENT

The CAC will assess its accomplishments at least annually. Primary criteria may include:

- **Purpose:** Did the CAC stick to the purpose set forth above or did it stray into areas not relevant to the purpose or mission of Intercity Transit.
- **Usefulness:** Did the CAC transmit to the Authority relevant and meaningful recommendations.
- **Scope of Work:** Did the CAC achieve the various tasks and or consider Authority recommendations addressed during the previous evaluation and/or those requested throughout the year? If not, why? How did Intercity Transit and the community benefit from the results of the CAC's achievements?
- **Other:** Other criteria suggested by the CAC members may be used. (*Amended 07/16/01; February 14, 2005*)

## USE OF THE OPERATING GUIDELINES

The meeting protocol supersedes all other meeting procedures and will be used by the CAC until and unless it is amended by majority vote. Any such amendment will be recorded in the minutes and provided to the CAC members.

## AMENDMENTS

These operating principles may be amended by a majority vote of the Citizen Advisory Committee members at any meeting of the CAC. Copies of the proposed revisions or amendments must be provided to CAC and Authority members thirty days in advance of the meeting at which the changes are to be acted upon. (New Section Added 12/20/04)

**ADOPTED this 17th day of July, 2000.**

**Amended: February 19, 2001  
July 16, 2001  
December 16, 2002  
December 20, 2004  
February 14, 2005  
July 6, 2016**

**INTERCITY TRANSIT  
CITIZEN ADVISORY COMMITTEE**  
*Bylaws*

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**PURPOSE AND AUTHORITY**

To advise the Intercity Transit Authority concerning transportation issues, to advocate for transportation choices and to represent the public in accomplishing Intercity Transit's mission and goals. (Amended 07/16/01; 03/05/08)

This includes issues related to Public Transportation Benefit Areas (PTBAs), the Transit Development Plan (TDP), other plans or service planning efforts of Intercity Transit, the agency's budget and programs of capital projects and operating services, and general operating practices of Intercity Transit. (Amended 09/18/13)

The CAC is advisory to the Transit Authority, and provides customer feedback to the agency. (Amended 09/18/13)

**COMPOSITION**

The CAC shall be comprised of no more than twenty members appointed by the Intercity Transit Authority. One position is specifically reserved for a 15-19 year old from Thurston County. Membership shall reflect Intercity Transit's service area. Representation from each of the following groups shall be sought:

- Senior Citizen(s)
- Persons with Disabilities
- Local College Student(s)
- Chambers of Commerce
- Business Representation (large and small)
- Service User(s) (fixed route, vanpool, DAL; Star Pass Holder)
- Youth (15-19 year old)
- City/State Transit Demand Management Coordinator(s)
- Social Service Agencies
- Medical Community
- Neighborhood Associations
- Rural Community
- Citizens-at-Large
- Native American
- Environmentalist
- Bicyclist

It is recognized a member may represent more than one of these groups. (*Amended 07/16/01; 12/20/04; 2/14/11*)

### **TERMS**

CAC members shall serve a term of three years, and may serve two complete terms. The Youth position will serve a one-year term and is eligible to reapply for a second one-year term. If a member is appointed to complete a vacant term, it is not considered a complete term. (*Amended 07/16/01; 12/20/04; 2/14/11*)

### **ATTENDANCE**

A CAC member who is absent more than twenty-five percent of the regular monthly committee meetings during a twelve month period will be removed from the committee. If staff needs to change the meeting date, and a member is unable to make the new date due to a conflict in their schedule, it will not be considered an absence. The staff liaison will track attendance and a monthly report will be included in the CAC packet.

A notification of membership forfeiture will automatically be sent to the respective member and Chair of the Citizen Advisory Committee when the fourth absence in a 12-month period occurs.

Members are encouraged to contact the staff liaison prior to a meeting when they are unable to attend, to ensure the CAC will have a quorum. (*Amended 07/16/01; 12/16/02; 12/20/04; 11/02/11; 02/13/12*)

### **MEETING SCHEDULE**

Meetings will be held on the third Monday of each month, except for the months of January and February. January and February meetings will be held the second Monday of the month. All meetings shall be held at Intercity Transit's administrative offices, in the boardroom. Meeting length will be determined by the agenda. If issues relevant to the CAC are insufficient in number or substance, the meeting may be canceled with the agreement of the CAC Chair and Vice Chair. Members will be notified of the cancellation at least 24-hours in advance of a meeting. (*Amended 12/20/04*)

### **AGENDA**

The CAC Chair will determine the agenda in conjunction with the Staff Liaison. Any member wishing to add an item for substantive discussion at the meeting may do so by contacting the CAC Chair or Staff Liaison at least ten days prior to the meeting date. CAC members may add items to the agenda at the beginning of a meeting with the understanding, that depending on the requirement for additional information, such

items may be discussed in a general way with substantive discussion and decision scheduled for a future meeting.

Staff Liaison shall mail the agenda to CAC members at least five days prior to the meeting and will send a copy of the packet to each member electronically. (Amended 02/13/12)

### MINUTES

The Staff Liaison shall distribute a summary of the meeting. Verbatim transcripts and detailed documentation of discussion will not be available. Members will be asked to consider and approve the minutes for the record by majority vote. The minutes will include a list of all members present and absent.

### QUORUM

It is intended a quorum should be present at each meeting. One more than half of the current CAC members constitutes a quorum. If a quorum is not present, the meeting may still be held and any decisions made by members present will be forwarded to the Authority with a note indicating a quorum was not present at the vote. If a meeting starts with a quorum, the quorum requirement is considered met, even if members leave following the opening of the meeting. (Amended 07/16/01)

The CAC shall use Robert's Rules of Order as a guideline for conducting its business except as provided otherwise by State law or the operating procedures.

### OFFICERS/TERM OF OFFICE

Officers will consist of Chair and Vice Chair. The process for choosing officers shall consist of nomination in October (either self-nomination or nomination by others) and affirmation by majority vote in November. (Amended 07/16/01; 2/06/08; 07/06/16)

Officers will serve a term of one year and may serve up to two terms in the same office. If a CAC member completes an officer vacancy during the year, it shall not be considered against the two term limitation. A member may serve two years as Chair and two years as Vice Chair consecutively.

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### Section 1.           Chair

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- preside at all meetings;
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## **MEETING PROTOCOL**

- *Presentations* made by staff or others should be succinct and relevant.
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The CAC will seek Authority feedback regarding disposition of the recommendation and/or points of view. *(Amended 07/16/01)*

### SELF ASSESSMENT

The CAC will assess its accomplishments at least annually. Primary criteria may include:

- **Purpose:** Did the CAC stick to the purpose set forth above or did it stray into areas not relevant to the purpose or mission of Intercity Transit.
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- **Scope of Work:** Did the CAC achieve the various tasks and/or consider Authority recommendations addressed during the previous evaluation and/or those requested throughout the year? If not, why? How did Intercity Transit and the community benefit from the results of the CAC's achievements?
- **Other:** Other criteria suggested by the CAC members may be used. *(Amended 07/16/01; February 14, 2005)*

### USE OF THE OPERATING GUIDELINES

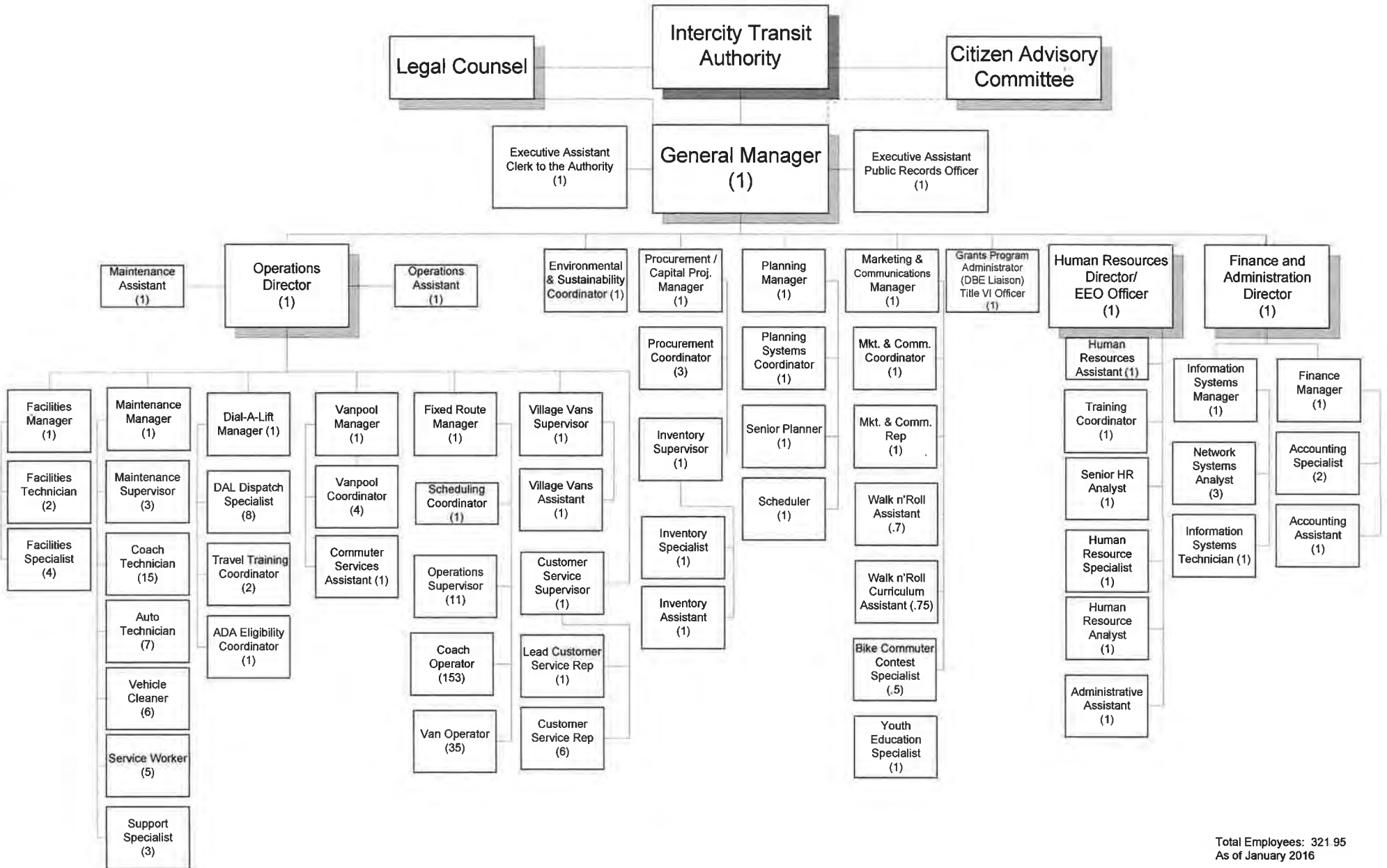
The meeting protocol supersedes all other meeting procedures and will be used by the CAC until and unless it is amended by majority vote. Any such amendment will be recorded in the minutes and provided to the CAC members.

### AMENDMENTS

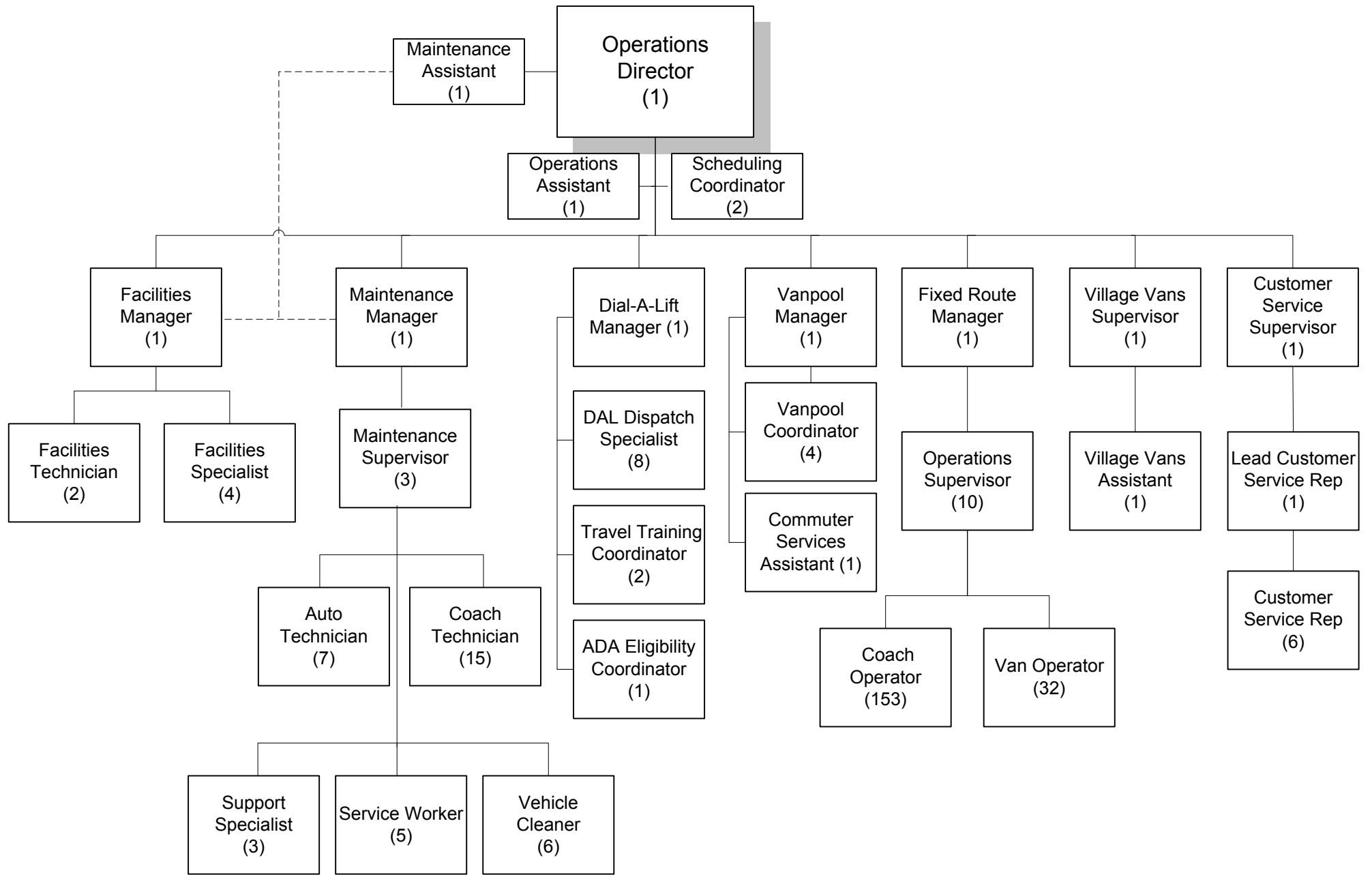
These bylaws may be amended by a majority vote of the Citizen Advisory Committee members at any meeting of the CAC. Copies of the proposed revisions or amendments must be provided to CAC and Authority members thirty days in advance of the meeting at which the changes are to be acted upon. *(New Section Added 12/20/04)*

**ADOPTED this 17th day of July, 2000.**

<b>Amended:</b>	<b>February 19, 2001</b>	<b>February 6, 2008</b>	<b>September 18, 2013</b>
	<b>July 16, 2001</b>	<b>March 5, 2008</b>	<b>July 6, 2016</b>
	<b>December 16, 2002</b>	<b>February 14, 2011</b>	
	<b>December 20, 2004</b>	<b>November 2, 2011</b>	
	<b>February 14, 2005</b>	<b>February 13, 2012</b>	

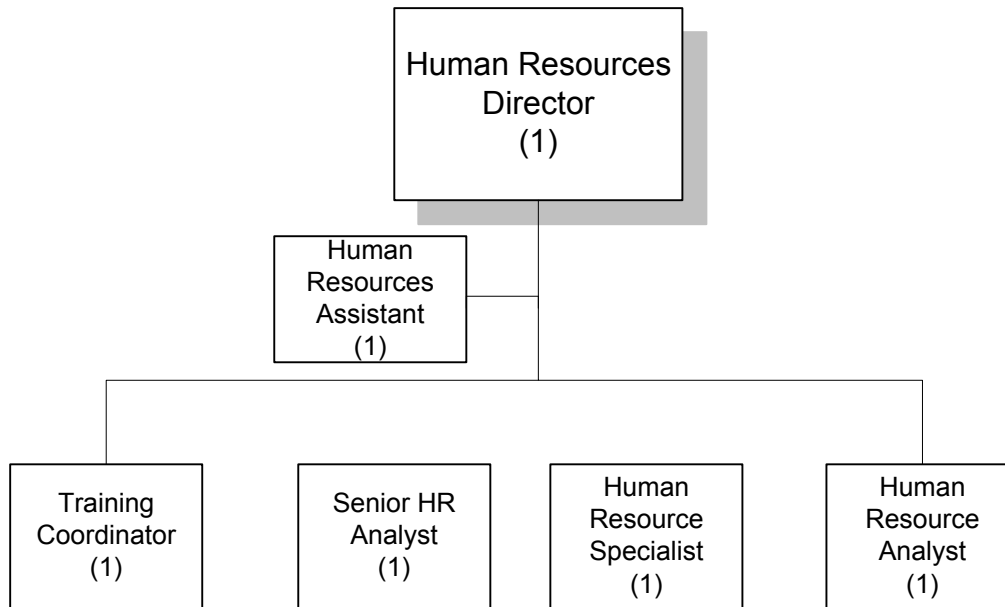


Total Employees: 321.95  
As of January 2016

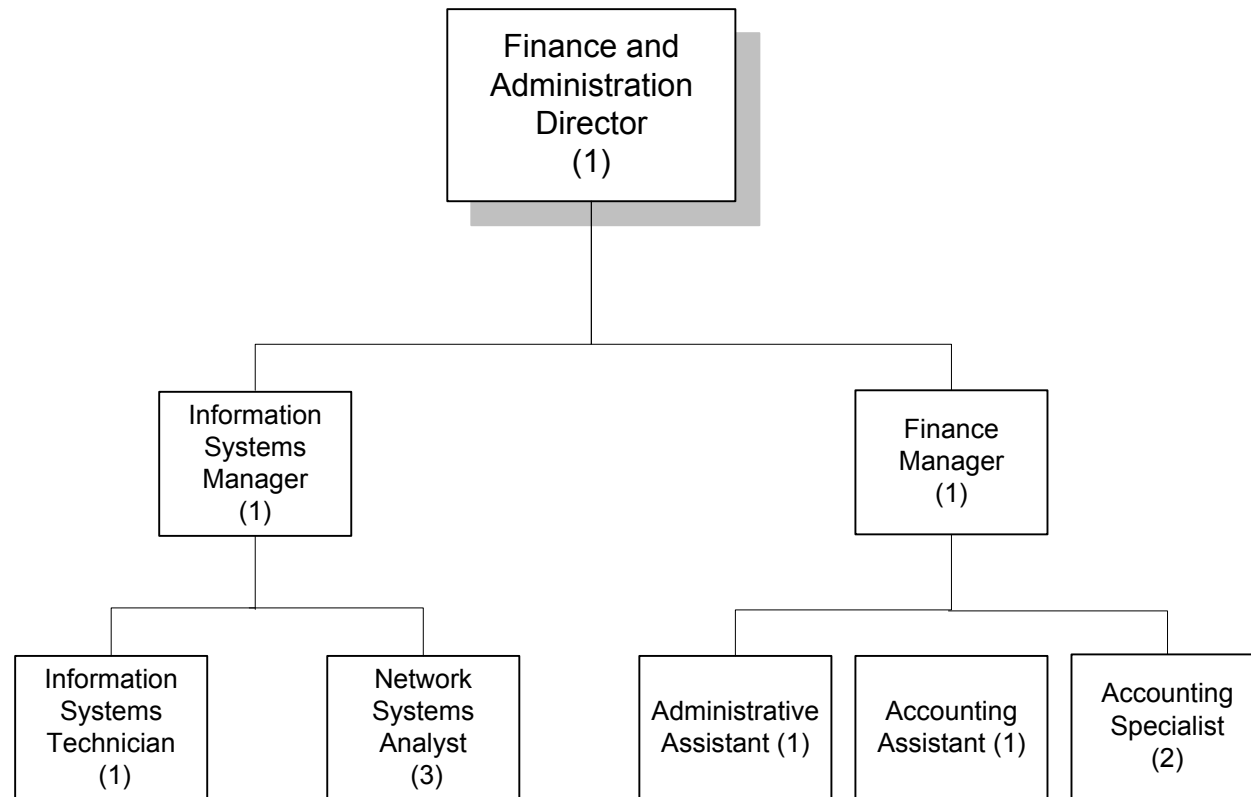


Total: 276  
As of July 2014

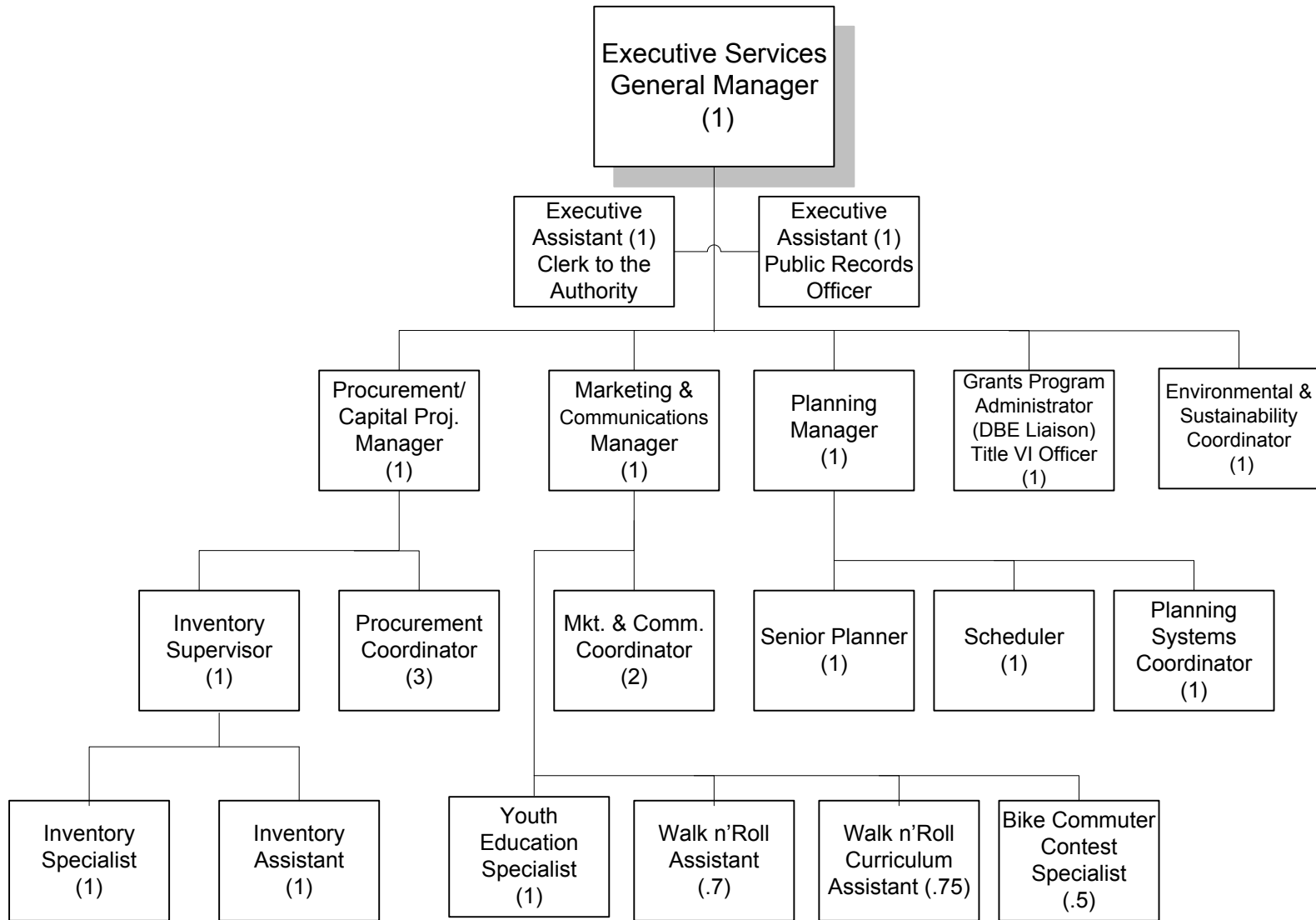




Total: 6  
As of July 2014



Total: 11  
As of July 2014



Total: 21.95  
As of July 2014



	Intercity Transit	Ben-Franklin Transit	Salem Transit	Lane Transit (Eugene)	Kitsap Transit	Pierce Transit	Whatcom Transit	LINK Transit
Director of Administration				X (Admin Services Mgr)				X
Director of Finance				X (Information Technology)	X		X	X
Government Relations Manager				X				
Director of Information Services			X					
Director of Specialized Transportation			X					
Public Relations Officer						X		
Capital Facilities Director					X			

# Memo

To: Intercity Transit Authority  
From: Michael Harbour  
Date: February 16, 2005  
Re: Intercity Transit Organization Structure

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## **Background and History**

The organizational structure of Intercity Transit has evolved over the 10 years I have been General Manager. I arrived at Intercity Transit following a period of significant turmoil. The previous General Manager restructured the organization in June 1994 to reduce the number of direct reports from six to four. The direct reports prior to June 1994 were:

- Assistant to General Manager
- Director of Marketing
- Director of Planning
- Director of Operations
- Director of Administrative Services
- Director of Procurement, Facilities and Grounds

The 1994 reorganization resulted from consultant work by Ben Adkins and Associates undertaken to address morale and communication problems within the agency. The reorganization was designed to reduce the number of direct reports to the General Manager due to time pressure from external sources and Board demands. The direct reports in this structure were:

- Director of Development. The Development department included four divisions – Market Development (Marketing and Short-Range Planning), Long-Range Planning, TDM Program Management (Vanpool and Commute Trip Reduction), and Special Projects Administration.
- Director of Operations. The Operations department had 4 divisions – Maintenance, Transportation (Operations Supervisors, Dispatchers, and Operators), Service Quality (Service Supervisors, Customer Services, Training, and Security), and Stops and Zones and Extra-Board Scheduling (reported to Assistant to the Operations Director).
- Director of Administration – The Administrative Department had six divisions (Inventory, Human Resources, Information Services, Facilities, Procurement, and Accounting).

The General Manager implemented this organization structure in June 1994 and left Intercity Transit in July 1994. An interim General Manager served until April 1995 and did not change the organizational structure.

I assumed the General Manager position in April 1995 and reorganized the staff in May 1995. I found the June 1994 organizational structure to be confusing with several areas having duplicative or unclear responsibilities. I also found the structure did not accurately depict what was occurring in the organization. Finally, the Authority provided clear direction that they wanted an organization dedicated to the principles of Total Quality Management.

The May 1995 reorganization was designed to produce a flatter organization, clarify areas of responsibility, and improve communications. The new structure had six direct reports:

- Assistant to the General Manager
- Director of Development (Long-Range Planning, Short-Range Planning, Procurement)
- Director of Marketing (Marketing, TDM, Customer Services)
- Director of Operations (Transportation, Dial-a-Lift, Stops and Zones)
- Director of Maintenance (Vehicle Maintenance)
- Director of Administration (Human Resources, Accounting, Information Services, Facilities, Inventory)

In early 1996, the Director of Administration left Intercity Transit. The former director's area of expertise was Human Resources. The organization did not have a senior management level financial position. The Director of Administration position was replaced by a Director of Finance and Administration to strengthen our financial planning and management capabilities and to address the growing importance of Information Services function. The Manager of Human Resources was promoted to Director of Human Resources. Inventory was moved to the Procurement division under the Development Department.

This organization was maintained for four years. In early 2000, due to the loss of MVET funding, the number of employees was reduced by over 35% and the organization was restructured. The major changes were:

- The Director of Marketing position was eliminated. Marketing became a division in the Development department. Customer Services was moved to Operations.
- The Human Resources department was absorbed into the Executive department with the Human Resources Director becoming the Human Resources Manager. The position continued to report directly to the General Manager with no decrease in job responsibilities.
- The TDM division was eliminated with vanpool moving to Operations and CTR to Development.
- Facilities moved to the Maintenance department.

This structure is essentially the structure that remains in place today. In December 2004, Human Resources was reestablished as a separate department with safety and security responsibilities. The Executive Services Administrator's title was changed to Executive Services Director to reflect that the position operates on a peer level with the five other direct reports to the General Manager.

### Current Organizational Structure

The current structure is shown on the attached Organization Chart and is discussed below. The General Manager reports to the Authority and is the sole direct employee of the Authority. The General Manager is responsible for the operations of the organization and has final authority on personnel issues. The Authority establishes policy and directs the General Manager by action of the entire Authority. The Legal Counsel is an employee of both the General Manager and the Authority and receives direction from the Authority Chair or the General Manager.

There are six department heads reporting directly to the General Manager. These staff serve as the Senior Management Team. All of these positions are in a single pay range. These include:

- **Director of Executive Services.** This position's responsibilities include:
  - Organizational Development (TQM, IHE Training, etc.)
  - Organization-Wide Training (Washington State Transportation Training Coalition)
  - Employee Recognition Programs
  - Citizen Work Group Liaison and Staffing
  - Clerk of Board and Authority Liaison
  - Public Records Officer
  - Legal Services Administration
  - Policy and Procedure Development
  - Records Retention and Compliance Officer
  - Signature Authority in General Manager's Absence
  - Community Outreach Activities (United Way, Tumwater and Yelm Chambers, TOGETHER!, etc.)
  
- **Director of Human Resources.** This position's responsibilities include:
  - Labor Relations and Negotiations
  - Personnel
  - Drug and Alcohol testing
  - Employee Assistance Programs
  - Agency-wide Safety
  - Security
  - Wellness Programs
  
- **Director of Operations.** This position's responsibilities include:
  - Transportation Division – includes all Operations Supervisors and all Operators.
  - Vanpool Division – includes Community Vans and Surplus Vans program.
  - Customer Services Division
  - Dial-A-Lift Division – includes Travel Training, ADA Certification, and Dispatching/Scheduling of Dial-A-Lift trips.
  - Transportation Training Coalition
  - Labor Relations - ATU



- **Director of Maintenance.** This position's responsibilities include:
  - Vehicle Maintenance
  - Facility Maintenance
  - Stops and Zones
  - Environmental Programs and Adherence
  - Labor Relations - IAM
  
- **Director of Development.** This position's responsibilities include:
  - Planning Division. Includes short and long-range planning, driver scheduling, development and site review, bus shelter and stop siting, and route and schedule planning
  - Procurement Division. Includes Inventory function, procurement and project management, and administration of procurement policies.
  - Village Vans
  - Marketing and Communications Division. Includes advertising, public relations, communications, Commute Trip Reduction, and website management.
  - Grant management
  - Liaison to federal elected officials and Federal Transit Administration
  
- **Director of Finance and Administration.** This position's responsibilities include:
  - Accounting Division. Includes payroll, accounts payable and receivable, fares, and other financial transactions.
  - Reception.
  - Information Services. Includes purchase and maintenance of all computer systems, telephone system, and other equipment.
  - Liaison to Washington State Insurance Pool and other risk management activities.
  - Pension plan administration.
  - Financial management.

### **Factors Affecting Organization Structure**

A number of factors determine the organizational structure of a public transportation organization.

**Management Style and Philosophy:** The current organization structure reflects my approach to management. I manage in a collaborative style with most decisions being made through consensus decision-making by the Senior Management Team. I believe in providing department heads the responsibility and authority to run their departments with little involvement by me in their day-to-day activities. Areas of responsibility are clearly defined with my role being to ensure projects that involve multiple departments are coordinated and decision-making roles and responsibilities are well defined. This requires strong department heads with expertise in their areas of responsibility and who are willing to express differing points of view and to consider alternative approaches to resolving issues. The current Senior Management Team has been in place for over 8 years.

**Responsibilities and Roles of the Agency:** The scope and breadth of activities undertaken by a public transportation agency also affects the organization structure that will best work for the agency. Many agencies contract for Dial-A-Lift type service eliminating the need for this division. We had a division focused on Transportation Demand Management when we were the Commute Trip Reduction program administrators and the vanpool program was relatively new. These responsibilities are now folded into other parts of the organization. We are very active in planning activities and outreach programs for an organization of our size. The scale of our involvement in jurisdictional planning activities, site and development reviews, Travel Training, community van programs (Village Vans, Community Vans, Surplus Van Grant Program), Commute Trip Reduction, and bicycle/pedestrian advocacy is unusual for a relatively small transit system.

**Maturity of the Organization:** The organizational structure of an agency may be influenced by the maturity of an organization and its programs. In 1995, the major issues facing Intercity Transit were internal communications and employee morale. Labor negotiations were hostile with the initial IAM contract in arbitration and poor relations between the ATU and management. Policies and procedures were inconsistently documented and applied.

Today, there are good labor relations with mature bargaining agreements. Labor negotiations tend to focus on economic issues rather than on basic language issues. A number of communication tools are in place and departments work together well. Policies and procedures are documented in a standard format and are consistently applied. There is still work to be done in this area but initial steps have been taken.

These steps allow a much stronger external focus with most energy directed toward efforts to improve customer service and the quality of service. We are in the early stages of incorporating technology advances in our operation. The management of technology and data will be a major challenge over the next several years.

**General Manager's Work and Time Demands:** The requirements and pressures on the General Manager may also affect the organizational structure. In some transit agencies external obligations and Board communications prevent the General Manager from having an active role in day-to-day operations. These organizations often have an Assistant General Manager or Director of Operations that have several department heads reporting directly to them.

My time is split between external and internal responsibilities. Our location in Olympia obligates me to devote a significant amount of time and effort working with the Washington State Department of Transportation and the Legislature. I have assumed leadership roles in the Washington State Transit Association and represent public transportation on the Agency Council on Coordinated Transportation and the Commute Trip Reduction Task Force. I also represent Intercity Transit in the community by attending Chamber meetings and events and participating in community activities such as United Way.

Internally, I focus on areas the Authority identifies as priorities and on ensuring inter-departmental communications and cooperation is occurring. I am active in labor

negotiations and regularly meet with the leadership of both unions and the Operators Communication and Policy Committee. I also focus on planning, marketing, and mid and long-term financial planning.

**Capabilities of Individuals in Key Management Positions:** Organizational structures are often shaped by the expertise and efforts of persons in management positions in an agency. An example is Pierce Transit. The Director of Operations and Planning recently left the organization. Instead of trying to fill this position, a staff person was promoted to Director of Operations and the Planning function was placed under the direction of the Chief information Officer.

**Organization Structure of Other Public Transportation Agencies:** The attached table summarizes the organizational structure of seven Washington and Oregon transit systems – five of similar size, one smaller (LINK), and one significantly larger (Pierce). The General Manager in these systems has 6 or 7 direct reports with the exceptions of LINK with 5 direct reports and Lane transit with 8 direct reports. The positions and range of responsibilities vary widely. Virtually all systems have direct reports and director level positions in the following areas:

- Human Resources
- Planning/Development
- Operations
- Maintenance
- Finance/Administration

All systems have a direct report in the Executive Services area. The director level status of this position is unique to Intercity Transit, as is the assignment of responsibilities to this position.

Other positions that are director level positions in some organizations include:

- Marketing
- Finance and/or Administration as separate positions
- Capital Facilities
- Technology or Information Services
- Government Relations
- Public relations

### **Conclusion**

The current staff organization at Intercity Transit has essentially been in place since 2000. The members of the Senior Management Team have not changed since that time. Prior to December 2004, the members of the Senior Management Team were in two different pay ranges. The Compensation and Classification Study moved all members of the Senior Management Team to a single pay range and gave the six positions the title of "Director." Five of these positions are commonly at this level in most transit systems. The Executive Services Director is a position that is unique to Intercity Transit. This reflects the division of responsibilities and roles among departments, the expertise and skills of the position's incumbent, and the importance of the functions assigned to the position. This structure works well for Intercity Transit and reflects the responsibilities and authority given to each member of the Senior Management Team.

**INTERCITY TRANSIT AUTHORITY  
COMMITTEE ASSIGNMENTS  
As of February 2017**

**Each year in February, at the reorganizational meeting, the Intercity Transit Authority approves committee assignments, as follows:**

***Thurston Regional Planning Council:*** General responsibilities include attendance at the monthly Thurston Regional Planning Council meetings and providing a monthly report to the full Authority. Meets the 1st Friday of the month at 8:30 AM.

***Karen Messmer***  
*(Alternate: Debbie Sullivan)*

***Transportation Policy Board:*** General responsibilities include attending the monthly Transportation Policy Board meetings and providing a monthly report to the full Authority. No standing dates - generally meets at 7:00 AM on the first Wednesday of the month.

***Don Melnick***  
*(Alternate: Ryan Warner)*

***Pension Committee:*** The Intercity Transit Pension Committee consists of a Plan Committee (two permanent staff positions, one Authority member, and four employees), and the Executive Committee (two permanent staff positions and the Authority member); the Executive Committee selects services and makes decisions that comply with policy set by the Plan Committee as a whole. Meets quarterly - dates to be announced.

***Ryan Warner***

***Ad Hoc Committees:*** The Authority Chair may form ad hoc committees to address specific issues.

***Committee of the Whole:*** The Authority Chair may form a "Committee of the Whole," composed of all Authority members, to address major issues.

**Chapter 36.56 RCW****METROPOLITAN MUNICIPAL CORPORATIONFUNCTIONS, ETC.—ASSUMPTION BY COUNTIES****Chapter Listing | RCW Dispositions****Sections**

- 36.56.010** Assumption of rights, powers, functions, and obligations authorized.
- 36.56.020** Ordinance or resolution of intention to assume rights, powers, functions, and obligations—Adoption—Publication—Hearing.
- 36.56.030** Hearing.
- 36.56.040** Declaration of intention to assume—Submission of ordinance or resolution to voters required—Extent of rights, powers, functions, and obligations assumed and vested in county—Abolition of metropolitan council—Transfer of rights, powers, functions, and obligations to county.
- 36.56.050** Employees and personnel.
- 36.56.060** Apportionment of budgeted funds—Transfer and adjustment of funds, accounts and records.
- 36.56.070** Existing rights, actions, proceedings, etc. not impaired or altered.
- 36.56.080** Collective bargaining units or agreements.
- 36.56.090** Rules and regulations, pending business, contracts, obligations, validity of official acts.
- 36.56.100** Real and personal property—Reports, books, records, etc.—Funds, credits, assets—Appropriations or federal grants.
- 36.56.110** Debts and obligations.
- 36.56.121** Maintenance plan.
- 36.56.900** Severability—Construction—1977 ex.s. c 277.
- 36.56.910** Effective date—1977 ex.s. c 277.

**NOTES:**

*Acquisition of interests in land for conservation, protection, preservation, or open space purposes by county or metropolitan municipal corporation: RCW 64.04.130.*

**36.56.010****Assumption of rights, powers, functions, and obligations authorized.**

Any county with a population of two hundred ten thousand or more in which a metropolitan municipal corporation has been established pursuant to chapter 35.58 RCW with boundaries coterminous with the boundaries of the county may by ordinance or resolution, as the case may be, of the county legislative authority assume the rights, powers, functions, and obligations of such metropolitan municipal corporation in accordance with the provisions of \*this 1977 amendatory act. The definitions contained in RCW 35.58.020 shall be applicable to this chapter.

[ 1991 c 363 § 72; 1977 ex.s. c 277 § 1.]

**NOTES:**

\***Reviser's note:** "this 1977 amendatory act" or "this act" [1977 ex.s. c 277] consists of chapter 36.56 RCW and the amendment to RCW 35.58.020 by 1977 ex.s. c 277.

**Purpose—Captions not law—1991 c 363:** See notes following RCW 2.32.180.

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### **36.56.020**

#### **Ordinance or resolution of intention to assume rights, powers, functions, and obligations—Adoption—Publication—Hearing.**

The assumption of the rights, powers, functions, and obligations of a metropolitan municipal corporation may be initiated by the adoption of an ordinance or a resolution, as the case may be, by the county legislative authority indicating its intention to conduct a hearing concerning assumption of such rights, powers, functions, and obligations. In the event the county legislative authority adopts such an ordinance or a resolution of intention, such ordinance or resolution shall set a time and place at which it will consider the proposed assumption of the rights, powers, functions, and obligations of the metropolitan municipal corporation, and shall state that all persons interested may appear and be heard. Such ordinance or resolution of intention shall be published for at least four times during the four weeks next preceding the scheduled hearing in newspapers of daily general circulation printed or published in said county.

[ 1977 ex.s. c 277 § 2.]

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### **36.56.030**

#### **Hearing.**

At the time scheduled for the hearing in the ordinance or resolution of intention, the county legislative authority shall consider the assumption of the rights, powers, functions, and obligations of the metropolitan municipal corporation, and hear those appearing and all protests and objections to it. The county legislative authority may continue the hearing from time to time, not exceeding sixty days in all.

[ 1977 ex.s. c 277 § 3.]

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### **36.56.040**

#### **Declaration of intention to assume—Submission of ordinance or resolution to voters required—Extent of rights, powers, functions, and obligations assumed and vested in county—Abolition of metropolitan council—Transfer of rights, powers, functions, and obligations to county.**

If, from the testimony given before the county legislative authority, it appears that the public interest or welfare would be satisfied by the county assuming the rights, powers, functions, and obligations of the metropolitan municipal corporation, the county legislative authority may declare that to be its intent and assume such rights, powers, functions, and obligations by ordinance or resolution, as the case may be, providing that the county shall be vested with every right, power, function, and obligation currently granted to or possessed by the metropolitan municipal corporation pursuant to chapter 35.58 RCW (including \*RCW 35.58.273 relating to levy and use of the motor vehicle excise tax) or other provision of state law, including but not limited to, the power and authority to levy a sales and use tax pursuant to chapter 82.14 RCW or other provision of law: PROVIDED, That such ordinance or resolution shall be

submitted to the voters of the county for their adoption and ratification or rejection, and if a majority of the persons voting on the proposition residing within the central city shall vote in favor thereof and a majority of the persons voting on the proposition residing in the metropolitan area outside of the central city shall vote in favor thereof, the ordinance or resolution shall be deemed adopted and ratified.

Upon assumption of the rights, powers, functions, and obligations of the metropolitan municipal corporation by the county, the metropolitan council established pursuant to the provisions of RCW 35.58.120 through 35.58.160 shall be abolished, said provisions shall be inapplicable to the county, and the county legislative authority shall thereafter be vested with all rights, powers, duties, and obligations otherwise vested by law in the metropolitan council: PROVIDED, That in any county with a home rule charter such rights, powers, functions, and obligations shall vest in accordance with the executive and legislative responsibilities defined in such charter.

[ 1977 ex.s. c 277 § 4.]

#### NOTES:

\*Reviser's note: RCW 35.58.273 was repealed by 2002 c 6 § 2.

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### 36.56.050

#### Employees and personnel.

All employees and personnel of the metropolitan municipal corporation who are under a personnel system pursuant to RCW 35.58.370 shall be assigned to the county personnel system to perform their usual duties upon the same terms as formerly, without any loss of rights, subject to any action that may be appropriate thereafter in accordance with the laws and rules governing the county personnel system.

[ 1977 ex.s. c 277 § 5.]

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### 36.56.060

#### Apportionment of budgeted funds—Transfer and adjustment of funds, accounts and records.

If apportionments of budgeted funds are required because of the transfers authorized by this chapter, the county budget office shall certify such apportionments to the agencies and local governmental units affected and to the state auditor. Each of these shall make the appropriate transfer and adjustments in funds and appropriation accounts and equipment records in accordance with such certification.

[ 1977 ex.s. c 277 § 6.]

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### 36.56.070

#### Existing rights, actions, proceedings, etc. not impaired or altered.

No transfer of any function made pursuant to this chapter shall be construed to impair or alter any existing rights acquired under the provisions of chapter 35.58 RCW or any other provision of law relating to metropolitan municipal corporations, nor as impairing or altering any actions, activities, or proceedings

validated thereunder, nor as impairing or altering any civil or criminal proceedings instituted thereunder, nor any rule, regulation, or order promulgated thereunder, nor any administrative action taken thereunder; and neither the assumption of control of any metropolitan municipal function by a county, nor any transfer of rights, powers, functions, and obligations as provided in this chapter, shall impair or alter the validity of any act performed by such metropolitan municipal corporation or division thereof or any officer thereof prior to the assumption of such rights, powers, functions, and obligations by any county as authorized by this chapter.

[ 1977 ex.s. c 277 § 7.]

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### **36.56.080**

#### **Collective bargaining units or agreements.**

Nothing contained in this chapter shall be construed to alter any existing collective bargaining unit or the provisions of any existing collective bargaining agreement until any such agreement has expired or until any such bargaining unit has been modified as provided by law.

[ 1977 ex.s. c 277 § 8.]

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### **36.56.090**

#### **Rules and regulations, pending business, contracts, obligations, validity of official acts.**

All rules and regulations, and all pending business before the committees, divisions, boards, and other agencies of any metropolitan municipal corporation transferred pursuant to the provisions of this chapter shall be continued and acted upon by the county.

All existing contracts and obligations of the transferred metropolitan municipal corporation shall remain in full force and effect, and shall be performed by the county. No transfer authorized in this chapter shall affect the validity of any official act performed by any official or employee prior to the transfer authorized pursuant to \*this amendatory act.

[ 1977 ex.s. c 277 § 9.]

#### **NOTES:**

**\*Reviser's note:** "this amendatory act," see note following RCW 36.56.010.

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### **36.56.100**

#### **Real and personal property—Reports, books, records, etc.—Funds, credits, assets—Appropriations or federal grants.**

When the rights, powers, functions, and obligations of a metropolitan municipal corporation are transferred pursuant to this chapter, all real and personal property owned by the metropolitan municipal corporation shall become that of the county.



All reports, documents, surveys, books, records, files, papers, or other writings relating to the administration of the powers, duties, and functions transferred pursuant to this chapter and available to the metropolitan municipal corporation shall be made available to the county.

All cabinets, furniture, office equipment, motor vehicles, and other tangible property employed in carrying out the rights, powers, functions, and obligations transferred by this chapter and available to the metropolitan municipal corporation shall be made available to the county.

All funds, credits, or other assets held in connection with powers, duties, and functions herein transferred shall be assigned to the county.

Any appropriations or federal grant made to any committee, division, board, or other department of a metropolitan municipal corporation for the purpose of carrying out the rights, powers, functions, and obligations authorized to be assumed by a county pursuant to this chapter shall on the effective date of such transfer be credited to the county for the purpose of carrying out such transferred rights, powers, functions, and obligations.

[ 1977 ex.s. c 277 § 10.]

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## **36.56.110**

### **Debts and obligations.**

The county shall assume and agree to provide for the payment of all of the indebtedness of the metropolitan municipal corporation including the payment and retirement of outstanding general obligation and revenue bonds issued by the metropolitan municipal corporation. Until the indebtedness of a metropolitan municipal corporation thus assumed by a county has been discharged, all property within the boundaries of the metropolitan municipal corporation and the owners and occupants of that property, shall continue to be liable for taxes, special assessments, and other charges legally pledged to pay the indebtedness of the metropolitan municipal corporation. The county shall assume the obligation of causing the payment of such indebtedness, collecting such taxes, assessments, and charges and observing and performing the other contractual obligations of the metropolitan municipal corporation. The legislative authority of the county shall act in the same manner as the governing body of the metropolitan municipal corporation for the purpose of certifying the amount of any property tax to be levied and collected therein, and may cause service and other charges and assessments to be collected from such property or owners or occupants thereof, enforce such collection and perform all acts necessary to ensure performance of the contractual obligations of the metropolitan municipal corporation in the same manner and by the same means as if the property of the metropolitan municipal corporation had not been acquired by the county.

When a county assumes the obligation of paying indebtedness of a metropolitan municipal corporation and if property taxes or assessments have been levied and service and other charges have accrued for such purpose but have not been collected by the metropolitan municipal corporation prior to such assumption, the same when collected shall belong and be paid to the county and be used by such county so far as necessary for payment of the indebtedness of the metropolitan municipal corporation existing and unpaid on the date such county assumed that indebtedness. Any funds received by the county which have been collected for the purpose of paying any bonded or other indebtedness of the metropolitan municipal corporation shall be used for the purpose for which they were collected and for no other purpose until such indebtedness has been paid and retired or adequate provision has been made for such payment and retirement. No transfer of property as provided in \*this act shall derogate from the claims or rights of the creditors of the metropolitan municipal corporation or impair the ability of the metropolitan municipal corporation to respond to its debts and obligations.

[ 1977 ex.s. c 277 § 11.]

**NOTES:**

**\*Reviser's note:** "this act," see note following RCW 36.56.010.

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**36.56.121****Maintenance plan.**

As a condition of receiving state funding, a county that has assumed the transportation functions of a metropolitan municipal corporation shall submit a maintenance and preservation management plan for certification by the department of transportation. The plan must inventory all transportation system assets within the direction and control of the county, and provide a preservation plan based on lowest life-cycle cost methodologies.

[ 2006 c 334 § 29; 2003 c 363 § 303.]

**NOTES:**

**Effective date—2006 c 334:** See note following RCW 47.01.051.

**Finding—Intent—2003 c 363:** See note following RCW 35.84.060.

**Part headings not law—Severability—2003 c 363:** See notes following RCW 47.28.241.

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**36.56.900****Severability—Construction—1977 ex.s. c 277.**

If any provision of this 1977 amendatory act, or its application to any person or circumstance is held invalid, the remainder of the act, or the application of the provision to other persons or circumstances is not affected. In the event the provisions in RCW 36.56.040 requiring approval by both the voters of a central city and the county voters residing outside of the central city are held to be invalid, then such provisions shall be severable and the ballot proposition on the transfer of the metropolitan municipal corporation to the county shall be decided by the majority vote of the voters voting thereon in a countywide election.

[ 1977 ex.s. c 277 § 14.]

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**36.56.910****Effective date—1977 ex.s. c 277.**

This 1977 amendatory act shall take effect July 1, 1978.

[ 1977 ex.s. c 277 § 15.]

**Chapter 36.57A RCW****PUBLIC TRANSPORTATION BENEFIT AREAS****Chapter Listing | RCW Dispositions****Sections**

<b>36.57A.010</b>	Definitions.
<b>36.57A.011</b>	Municipality defined.
<b>36.57A.020</b>	Public transportation improvement conference—Convening—Purpose—Multi-county conferences.
<b>36.57A.030</b>	Establishment or change in boundaries of public transportation benefit area—Hearing—Notice—Procedure—Authority of county to terminate public transportation benefit area.
<b>36.57A.040</b>	Cities included or excluded—Boundaries—Only benefited areas included—One area per county, exception.
<b>36.57A.050</b>	Governing body—Selection, qualification, number of members—Travel expenses, compensation.
<b>36.57A.055</b>	Governing body—Periodic review of composition.
<b>36.57A.060</b>	Comprehensive plan—Development—Elements.
<b>36.57A.070</b>	Comprehensive plan—Review.
<b>36.57A.080</b>	General powers.
<b>36.57A.090</b>	Additional powers—Acquisition of existing system.
<b>36.57A.100</b>	Agreements with operators of local public transportation services—Operation without agreement prohibited—Purchase or condemnation of assets.
<b>36.57A.110</b>	Powers of component city concerning passenger transportation transferred to benefit area—Operation of system by city until acquired by benefit area—Consent.
<b>36.57A.120</b>	Acquisition of existing system—Labor contracts, employee rights preserved—Collective bargaining.
<b>36.57A.130</b>	Treasurer and auditor—Powers and duties—Transportation fund—Contribution of sums for expenses.
<b>36.57A.140</b>	Annexation of additional area.
<b>36.57A.150</b>	Advanced financial support payments.
<b>36.57A.160</b>	Dissolution and liquidation.
<b>36.57A.170</b>	Rail fixed guideway public transportation system—Safety program plan and security and emergency preparedness plan.
<b>36.57A.180</b>	Public transportation for persons with special needs.
<b>36.57A.191</b>	Maintenance plan.
<b>36.57A.200</b>	Passenger-only ferry service—Authorized—Investment plan.
<b>36.57A.210</b>	Passenger-only ferry service—Taxes, fees, and tolls.
<b>36.57A.220</b>	Passenger-only ferry service between Kingston and Seattle.
<b>36.57A.222</b>	Passenger-only ferry service districts—Authorized—Investment plan—Dissolution.
<b>36.57A.224</b>	Passenger-only ferry service districts—Revenue.
<b>36.57A.226</b>	Passenger-only ferry service districts—Issuance of bonds.
<b>36.57A.230</b>	Public transportation fares—Proof of payment—Civil infractions.
<b>36.57A.235</b>	Public transportation fares—Schedule of fines and penalties—Who may monitor fare payment—Administration of citations.
<b>36.57A.240</b>	Public transportation fares—Powers of law enforcement authorities.
<b>36.57A.245</b>	Public transportation fares—Powers and authority are supplemental to other laws.
<b>36.57A.250</b>	Supplemental transportation improvements.

**NOTES:**

*Financing of public transportation systems: Chapter 35.95 RCW and RCW 82.14.045.*

*Transportation centers authorized: Chapter 81.75 RCW.*

**36.57A.010****Definitions.**

The definitions set forth in this section apply throughout this chapter unless the context clearly requires otherwise.

- (1) "City" means an incorporated city or town.
- (2) "City council" means the legislative body of any city or town.
- (3) "Component city" means an incorporated city or town within a public transportation benefit area.
- (4) "County legislative authority" means the board of county commissioners or the county council.
- (5) "Population" means the number of residents as shown by the figures released for the most recent official state, federal, or county census, or population determination made by the office of financial management.
- (6) "Proof of payment" means evidence of fare prepayment authorized by a public transportation benefit area for the use of buses or other modes of public transportation.
- (7) "Public transportation benefit area" means a municipal corporation of the state of Washington created pursuant to this chapter.
- (8) "Public transportation benefit area authority" or "authority" means the legislative body of a public transportation benefit area.
- (9) "Public transportation improvement conference" or "conference" means the body established pursuant to RCW 36.57A.020 which shall be authorized to establish, subject to the provisions of RCW 36.57A.030, a public transportation benefit area pursuant to the provisions of this chapter.
- (10) "Public transportation service" means the transportation of packages, passengers, and their incidental baggage by means other than by chartered bus, sight-seeing bus, together with the necessary passenger terminals and parking facilities or other properties necessary for passenger and vehicular access to and from such people moving systems: PROVIDED, That nothing shall prohibit an authority from leasing its buses to private certified carriers or prohibit the authority from providing school bus service. "Public transportation service" includes passenger-only ferry service for those public transportation benefit areas eligible to provide passenger-only ferry service under RCW 36.57A.200.

[ 2008 c 123 § 10; 2003 c 83 § 209; 1983 c 65 § 1; 1979 c 151 § 40; 1975 1st ex.s. c 270 § 11.]

**NOTES:**

**Alphabetization—2008 c 123:** See note following RCW 35.58.020.

**Findings—Intent—Captions, part headings not law—Severability—Effective date—2003 c 83:** See notes following RCW 36.57A.200.

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

*Population determinations, office of financial management: Chapter 43.62 RCW.*

**36.57A.011****Municipality defined.**

See RCW 35.58.272.

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**36.57A.020****Public transportation improvement conference—Convening—Purpose—Multi-county conferences.**

The county legislative authority of every county with a population of forty thousand or more shall, and the legislative authority of every other county may, within ninety days of July 1, 1975, and as often thereafter as it deems necessary, and upon thirty days prior written notice addressed to the legislative body of each city within the county and with thirty days public notice, convene a public transportation improvement conference to be attended by an elected representative selected by the legislative body of each city, within such county, and by the county legislative authority. Such conference shall be for the purpose of evaluating the need for and the desirability of the creation of a public transportation benefit area within certain incorporated and unincorporated portions of the county to provide public transportation services within such area. In those counties where county officials believe the need for public transportation service extends across county boundaries so as to provide public transportation service in a metropolitan area, the county legislative bodies of two or more neighboring counties may elect to convene a multi-county conference. In addition, countywide conferences may be convened by resolution of the legislative bodies of two or more cities within the county, not to exceed one in any twelve month period, or a petition signed by at least ten percent of the registered voters in the last general election of the city, county or city/county areas of a proposed benefit area. The chair of the conference shall be elected from the members at large.

[ 1991 c 363 § 73; 1975 1st ex.s. c 270 § 12.]

**NOTES:**

**Purpose—Captions not law—1991 c 363:** See notes following RCW 2.32.180.

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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**36.57A.030****Establishment or change in boundaries of public transportation benefit area—Hearing—Notice—Procedure—Authority of county to terminate public transportation benefit area.**

Any conference which finds it desirable to establish a public transportation benefit area or change the boundaries of any existing public transportation benefit area shall fix a date for a public hearing thereon, or the legislative bodies of any two or more component cities or the county legislative body by resolution may require the public transportation improvement conference to fix a date for a public hearing thereon. Prior to the convening of the public hearing, the county governing body shall delineate the area of the county proposed to be included within the transportation benefit area, and shall furnish a copy of such delineation to each incorporated city within such area. Each city shall advise the county governing body, on a preliminary basis, of its desire to be included or excluded from the transportation

benefit area by means of an ordinance adopted by the legislative body of that city. The county governing body shall cause the delineations to be revised to reflect the wishes of such incorporated cities. This delineation shall be considered by the conference at the public hearing for inclusion in the public transportation benefit area.

Notice of such hearing shall be published once a week for at least four consecutive weeks in one or more newspapers of general circulation within the area. The notice shall contain a description and map of the boundaries of the proposed public transportation benefit area and shall state the time and place of the hearing and the fact that any changes in the boundaries of the public transportation benefit area will be considered at such time and place. At such hearing or any continuation thereof, any interested person may appear and be heard on all matters relating to the effect of the formation of the proposed public transportation benefit area.

The conference may make such changes in the boundaries of the public transportation benefit area as they shall deem reasonable and proper, but may not delete any portion of the proposed area which will create an island of included or excluded lands, and may not delete a portion of any city. If the conference shall determine that any additional territory should be included in the public transportation benefit area, a second hearing shall be held and notice given in the same manner as for the original hearing. The conference may adjourn the hearing on the formation of a public transportation benefit area from time to time not exceeding thirty days in all.

Following the conclusion of such hearing the conference shall adopt a resolution fixing the boundaries of the proposed public transportation benefit area, declaring that the formation of the proposed public transportation benefit area will be conducive to the welfare and benefit of the persons and property therein.

Within thirty days of the adoption of such conference resolution, the county legislative authority of each county wherein a conference has established proposed boundaries of a public transportation benefit area, may by resolution, upon making a legislative finding that the proposed benefit area includes portions of the county which could not be reasonably expected to benefit from such benefit area or excludes portions of the county which could be reasonably expected to benefit from its creation, disapprove and terminate the establishment of such public transportation benefit area within such county.

[ 2016 c 95 § 11; 1977 ex.s. c 44 § 1; 1975 1st ex.s. c 270 § 13.]

#### NOTES:

**Intent—2016 c 95:** See note following RCW 19.360.020.

**Severability—1977 ex.s. c 44:** "If any provision of this 1977 amendatory act, or its application to any person or circumstance is held invalid, the remainder of the act, or the application of the provision to other persons or circumstances is not affected." [ 1977 ex.s. c 44 § 7.]

**Effective date—1977 ex.s. c 44:** "This 1977 amendatory act is necessary for the immediate preservation of the public peace, health, and safety, the support of the state government and its existing public institutions, and shall take effect July 1, 1977." [ 1977 ex.s. c 44 § 8.]

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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### 36.57A.040

**Cities included or excluded—Boundaries—Only benefited areas included—One area per county, exception.**

At the time of its formation no public transportation benefit area may include only a part of any city, and every city shall be either wholly included or wholly excluded from the boundaries of such area. Notwithstanding any other provision of law, if subsequent to the formation of a public transportation benefit area additional area became or will become a part of a component city by annexation, merger, or otherwise, the additional area shall be included within the boundaries of the transportation benefit area and be subject to all taxes and other liabilities and obligations of the public transportation benefit area. The component city shall be required to notify the public transportation benefit area at the time the city has added the additional area. Furthermore, notwithstanding any other provisions of law except as specifically provided in this section, if a city that is not a component city of the public transportation benefit area adds area to its boundaries that is within the boundaries of the public transportation benefit area, the area so added shall be deemed to be excluded from the public transportation benefit area: PROVIDED, That the public transportation benefit area shall be given notice of the city's intention to add such area. If a city extends its boundaries through annexation across a county boundary line and such extended boundaries include areas within the public transportation benefit area, then the entire area of the city within the county that is within the public transportation benefit area shall be included within the public transportation benefit area boundaries. Such area of the city in the public transportation benefit area shall be considered a component city of the public transportation benefit area corporation.

The boundaries of any public transportation benefit area shall follow school district lines or election precinct lines, as far as practicable. Only such areas shall be included which the conference determines could reasonably benefit from the provision of public transportation services. Except as provided in RCW 36.57A.140(2), only one public transportation benefit area may be created in any county.

[ 1992 c 16 § 1; 1991 c 318 § 15; 1983 c 65 § 2; 1975 1st ex.s. c 270 § 14.]

#### NOTES:

**Intent—1991 c 318:** "The legislature recognizes that certain communities have important cultural, economic, or transportation linkages to communities in other counties. Many public services can most efficiently be delivered from public agencies located in counties other than the county within which the community is located. It is the intent of the legislature by enacting sections 15 through 17 of this act to further more effective public transportation linkages between communities, regardless of county association, in order to better serve state citizen needs." [ 1991 c 318 § 14.]

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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### 36.57A.050

#### **Governing body—Selection, qualification, number of members—Travel expenses, compensation.**

Within sixty days of the establishment of the boundaries of the public transportation benefit area the members of the county legislative authority and the elected representative of each city within the area shall provide for the selection of the governing body of such area, the public transportation benefit area authority, which shall consist of elected officials selected by and serving at the pleasure of the governing bodies of component cities within the area and the county legislative authority of each county within the area. If at the time a public transportation benefit area authority assumes the public transportation functions previously provided under the Interlocal Cooperation Act (chapter 39.34 RCW) there are citizen positions on the governing board of the transit system, those positions may be retained as positions on the governing board of the public transportation benefit area authority.

Within such sixty-day period, any city may by resolution of its legislative body withdraw from participation in the public transportation benefit area. The county legislative authority and each city remaining in the public transportation benefit area may disapprove and prevent the establishment of any governing body of a public transportation benefit area if the composition thereof does not meet its approval.

In no case shall the governing body of a single county public transportation benefit area be greater than nine voting members and in the case of a multicounty area, fifteen voting members. Those cities within the transportation benefit area and excluded from direct membership on the authority are hereby authorized to designate a member of the authority who shall be entitled to represent the interests of such city which is excluded from direct membership on the authority. The legislative body of such city shall notify the authority as to the determination of its authorized representative on the authority.

There is one nonvoting member of the public transportation benefit area authority. The nonvoting member is recommended by the labor organization representing the public transportation employees within the local public transportation system. If the public transportation employees are represented by more than one labor organization, all such labor organizations shall select the nonvoting member by majority vote. The nonvoting member shall comply with all governing bylaws and policies of the authority. The chair or cochair of the authority shall exclude the nonvoting member from attending any executive session held for the purpose of discussing negotiations with labor organizations. The chair or cochair may exclude the nonvoting member from attending any other executive session. The requirement that a nonvoting member be appointed to the governing body of a public transportation benefit area authority does not apply to an authority that has no employees represented by a labor union.

Each member of the authority is eligible to be reimbursed for travel expenses in accordance with RCW 43.03.050 and 43.03.060 and to receive compensation, as set by the authority, in an amount not to exceed forty-four dollars for each day during which the member attends official meetings of the authority or performs prescribed duties approved by the chair of the authority. Except that the authority may, by resolution, increase the payment of per diem compensation to each member from forty-four dollars up to ninety dollars per day or portion of a day for actual attendance at board meetings or for performance of other official services or duties on behalf of the authority. In no event may a member be compensated in any year for more than seventy-five days, except the chair who may be paid compensation for not more than one hundred days: PROVIDED, That compensation shall not be paid to an elected official or employee of federal, state, or local government who is receiving regular full-time compensation from such government for attending meetings and performing prescribed duties of the authority.

The dollar thresholds established in this section must be adjusted for inflation by the office of financial management every five years, beginning July 1, 2008, based upon changes in the consumer price index during that time period. "Consumer price index" means, for any calendar year, that year's annual average consumer price index, for Washington state, for wage earners and clerical workers, all items, compiled by the bureau of labor and statistics, United States department of labor. If the bureau of labor and statistics develops more than one consumer price index for areas within the state, the index covering the greatest number of people, covering areas exclusively within the boundaries of the state, and including all items shall be used for the adjustments for inflation in this section. The office of financial management must calculate the new dollar threshold and transmit it to the office of the code reviser for publication in the Washington State Register at least one month before the new dollar threshold is to take effect.

A person holding office as commissioner for two or more special purpose districts shall receive only that per diem compensation authorized for one of his or her commissioner positions as compensation for attending an official meeting or conducting official services or duties while representing more than one of his or her districts. However, such commissioner may receive additional per diem compensation if approved by resolution of all boards of the affected commissions.

[ 2010 c 278 § 3; 2009 c 549 § 4097; 2007 c 469 § 14; 1998 c 121 § 15; 1983 c 65 § 3; 1977 ex.s. c 44 § 2; 1975 1st ex.s. c 270 § 15.]



**NOTES:**

**Severability—Effective date—1977 ex.s. c 44:** See notes following RCW 36.57A.030.

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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**36.57A.055****Governing body—Periodic review of composition.**

After a public transportation benefit area has been in existence for four years, members of the county legislative authority and the elected representative of each city within the boundaries of the public transportation benefit area shall review the composition of the governing body of the benefit area and change the composition of the governing body if the change is deemed appropriate. The review shall be at a meeting of the designated representatives of the component county and cities, and the majority of those present shall constitute a quorum at such meeting. Twenty days notice of the meeting shall be given by the chief administrative officer of the public transportation benefit area authority. After the initial review, a review shall be held every four years.

If an area having a population greater than fifteen percent, or areas with a combined population of greater than twenty-five percent of the population of the existing public transportation benefit area as constituted at the last review meeting, annex to the public transportation benefit area, or if an area is added under RCW 36.57A.140(2), the representatives of the component county and cities shall meet within ninety days to review and change the composition of the governing body, if the change is deemed appropriate. This meeting is in addition to the regular four-year review meeting and shall be conducted pursuant to the same notice requirement and quorum provisions of the regular review.

[ 1991 c 318 § 16; 1983 c 65 § 4.]

**NOTES:**

**Intent—1991 c 318:** See note following RCW 36.57A.040.

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**36.57A.060****Comprehensive plan—Development—Elements.**

The public transportation benefit area authority authorized pursuant to RCW 36.57A.050 shall develop a comprehensive transit plan for the area. Such plan shall include, but not be limited to the following elements:

(1) The levels of transit service that can be reasonably provided for various portions of the benefit area.

(2) The funding requirements, including local tax sources, state and federal funds, necessary to provide various levels of service within the area.

(3) The impact of such a transportation program on other transit systems operating within that county or adjacent counties.

(4) The future enlargement of the benefit area or the consolidation of such benefit area with other transit systems.

[ 1975 1st ex.s. c 270 § 16.]

**NOTES:**

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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**36.57A.070****Comprehensive plan—Review.**

The comprehensive transit plan adopted by the authority shall be reviewed by the state department of transportation to determine:

- (1) The completeness of service to be offered and the economic viability of the transit system proposed in such comprehensive transit plan;
- (2) Whether such plan integrates the proposed transportation system with existing transportation modes and systems that serve the benefit area;
- (3) Whether such plan coordinates that area's system and service with nearby public transportation systems;
- (4) Whether such plan is eligible for matching state or federal funds.

[ 2006 c 334 § 30; 1985 c 6 § 5; 1975 1st ex.s. c 270 § 17.]

**NOTES:**

**Effective date—2006 c 334:** See note following RCW 47.01.051.

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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**36.57A.080****General powers.**

In addition to the powers specifically granted by this chapter a public transportation benefit area shall have all powers which are necessary to carry out the purposes of the public transportation benefit area. A public transportation benefit area may contract with the United States or any agency thereof, any state or agency thereof, any other public transportation benefit area, any county, city, metropolitan municipal corporation, special district, or governmental agency, within or without the state, and any private person, firm or corporation for the purpose of receiving gifts or grants or securing loans or advances for preliminary planning and feasibility studies, or for the design, construction or operation of transportation facilities. In addition a public transportation benefit area may contract with any governmental agency or with any private person, firm or corporation for the use by either contracting party of all or any part of the facilities, structures, lands, interests in lands, air rights over lands and rights-of-way of all kinds which are owned, leased or held by the other party and for the purpose of planning, constructing or operating any facility or performing any service which the public transportation benefit area may be authorized to operate or perform, on such terms as may be agreed upon by the contracting parties. Before any contract for the lease or operation of any public transportation benefit area facilities shall be let to any private person, firm or corporation, a general schedule of rental rates for bus equipment with or without drivers shall be publicly posted applicable to all private certificated carriers, and for other facilities competitive bids shall first be called upon such notice, bidder qualifications and bid conditions as the public transportation benefit area authority shall determine.

A public transportation benefit area may sue and be sued in its corporate capacity in all courts and in all proceedings.

[ 1975 1st ex.s. c 270 § 18.]

#### NOTES:

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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### 36.57A.090

#### **Additional powers—Acquisition of existing system.**

A public transportation benefit area authority shall have the following powers in addition to the general powers granted by this chapter:

(1) To prepare, adopt, and carry out a general comprehensive plan for public transportation service which will best serve the residents of the public transportation benefit area and to amend said plan from time to time to meet changed conditions and requirements.

(2) To acquire by purchase, condemnation, gift, or grant and to lease, construct, add to, improve, replace, repair, maintain, operate, and regulate the use of transportation facilities and properties within or without the public transportation benefit area or the state, including systems of surface, underground, or overhead railways, tramways, buses, or any other means of local transportation except taxis, and including escalators, moving sidewalks, or other people-moving systems, passenger terminal and parking facilities and properties, and such other facilities and properties as may be necessary for passenger and vehicular access to and from such people-moving systems, terminal and parking facilities and properties, together with all lands, rights-of-way, property, equipment, and accessories necessary for such systems and facilities. Public transportation facilities and properties which are owned by any city may be acquired or used by the public transportation benefit area authority only with the consent of the city council of the city owning such facilities. Cities are hereby authorized to convey or lease such facilities to a public transportation benefit area authority or to contract for their joint use on such terms as may be fixed by agreement between the city council of such city and the public transportation benefit area authority, without submitting the matter to the voters of such city.

The facilities and properties of a public transportation benefit area system whose vehicles will operate primarily within the rights-of-way of public streets, roads, or highways, may be acquired, developed, and operated without the corridor and design hearings which are required by \*RCW 35.58.273, as now or hereafter amended, for mass transit facilities operating on a separate right-of-way.

(3) To fix rates, tolls, fares, and charges for the use of such facilities and to establish various routes and classes of service. Fares or charges may be adjusted or eliminated for any distinguishable class of users including, but not limited to, senior citizens, handicapped persons, and students.

In the event any person holding a certificate of public convenience and necessity from the Washington utilities and transportation commission under RCW 81.68.040 has operated under such certificate for a continuous period of one year prior to the date of certification and is offering service within the public transportation benefit area on the date of the certification by the county canvassing board that a majority of votes cast authorize a tax to be levied and collected by the public transportation benefit area authority, such authority may by purchase or condemnation acquire at the fair market value, from the person holding the existing certificate for providing the services, that portion of the operating authority and equipment representing the services within the area of public operation. The person holding such existing certificate may require the public transportation benefit area authority to initiate such purchase of those assets of such person, existing as of the date of the county canvassing board certification, within sixty days after the date of such certification.

[ 1981 c 25 § 4; 1977 ex.s. c 44 § 3; 1975 1st ex.s. c 270 § 19.]

**NOTES:**

**\*Reviser's note:** RCW 35.58.273 was repealed by 2002 c 6 § 2.

**Severability—Effective date—1977 ex.s. c 44:** See notes following RCW 36.57A.030.

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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**36.57A.100****Agreements with operators of local public transportation services—Operation without agreement prohibited—Purchase or condemnation of assets.**

Except in accordance with an agreement made as provided in this section or in accordance with the provisions of RCW 36.57A.090(3) as now or hereafter amended, upon the effective date on which the public transportation benefit area commences to perform the public transportation service, no person or private corporation shall operate a local public passenger transportation service, including passenger-only ferry service, within the public transportation benefit area with the exception of taxis, buses owned or operated by a school district or private school, and buses owned or operated by any corporation or organization solely for the purposes of the corporation or organization and for the use of which no fee or fare is charged.

An agreement may be entered into between the public transportation benefit area authority and any person or corporation legally operating a local public passenger transportation service, including passenger-only ferry service, wholly within or partly within and partly without the public transportation benefit area and on said effective date under which such person or corporation may continue to operate such service or any part thereof for such time and upon such terms and conditions as provided in such agreement. Such agreement shall provide for a periodic review of the terms and conditions contained therein. Where any such local public passenger transportation service, including passenger-only ferry service, will be required to cease to operate within the public transportation benefit area, the public transportation benefit area authority may agree with the owner of such service to purchase the assets used in providing such service, or if no agreement can be reached, the public transportation benefit area authority shall condemn such assets in the manner and by the same procedure as is or may be provided by law for the condemnation of other properties for cities of the first class, except insofar as such laws may be inconsistent with the provisions of this chapter.

Wherever a privately owned public carrier operates wholly or partly within a public transportation benefit area, the Washington utilities and transportation commission shall continue to exercise jurisdiction over such operation as provided by law.

[ 2003 c 83 § 210; 1977 ex.s. c 44 § 4; 1975 1st ex.s. c 270 § 20.]

**NOTES:**

**Findings—Intent—Captions, part headings not law—Severability—Effective date—2003 c 83:** See notes following RCW 36.57A.200.

**Severability—Effective date—1977 ex.s. c 44:** See notes following RCW 36.57A.030.

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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**36.57A.110****Powers of component city concerning passenger transportation transferred to benefit area—Operation of system by city until acquired by benefit area—Consent.**

The public transportation benefit area shall have and exercise all rights with respect to the construction, acquisition, maintenance, operation, extension, alteration, repair, control and management of passenger transportation which any component city shall have been previously empowered to exercise and such powers shall not thereafter be exercised by such component cities without the consent of the public transportation benefit area: PROVIDED, That any city owning and operating a public transportation system on July 1, 1975 may continue to operate such system within such city until such system shall have been acquired by the public transportation benefit area and a public transportation benefit area may not acquire such system without the consent of the city council of such city.

[ 1975 1st ex.s. c 270 § 21.]

**NOTES:**

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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**36.57A.120****Acquisition of existing system—Labor contracts, employee rights preserved—Collective bargaining.**

If a public transportation benefit area shall acquire any existing transportation system, it shall assume and observe all existing labor contracts relating to such system and, to the extent necessary for operation of facilities, all of the employees of such acquired transportation system whose duties are necessary to operate efficiently the facilities acquired shall be appointed to comparable positions to those which they held at the time of such transfer, and no employee or retired or pensioned employee of such systems shall be placed in any worse position with respect to pension seniority, wages, sick leave, vacation or other benefits that he or she enjoyed as an employee of such system prior to such acquisition. The public transportation benefit area authority shall engage in collective bargaining with the duly appointed representatives of any employee labor organization having existing contracts with the acquired transportation system and may enter into labor contracts with such employee labor organization.

[ 2009 c 549 § 4098; 1975 1st ex.s. c 270 § 22.]

**NOTES:**

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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**36.57A.130****Treasurer and auditor—Powers and duties—Transportation fund—Contribution of**

## **sums for expenses.**

The treasurer of the county in which a public transportation benefit area authority is located shall be ex officio treasurer of the authority. In the case of a multicounty public transportation benefit area the county treasurer of the largest component county, by population, shall be the treasurer of the authority. However, the authority, by resolution, and upon the approval of the county treasurer, may designate some other person having experience in financial or fiscal matters as treasurer of the authority. Such a treasurer shall possess all of the powers, responsibilities, and duties the county treasurer possesses for a public transportation benefit area authority related to investing surplus authority funds. The authority may (and if the treasurer is not a county treasurer, it shall) require a bond with a surety company authorized to do business in the state of Washington in an amount and under the terms and conditions the authority, by resolution, from time to time finds will protect the authority against loss. The premium on any such bond shall be paid by the authority.

All authority funds shall be paid to the treasurer and shall be disbursed by the treasurer only on warrants issued by the county auditor, upon orders or vouchers approved by the authority. However, the authority may, by resolution, designate some person having experience in financial or fiscal matters, other than the county auditor, as the auditor of the authority. Such an auditor shall possess all of the powers, responsibilities, and duties that the county auditor possesses for a public transportation benefit area authority related to creating and maintaining funds, issuing warrants, and maintaining a record of receipts and disbursements.

The treasurer shall establish a "transportation fund," into which shall be paid all authority funds, and the treasurer shall maintain such special accounts as may be created by the authority into which shall be placed all money as the authority may, by resolution, direct.

If the treasurer of the authority is a treasurer of the county, all authority funds shall be deposited with the county depository under the same restrictions, contracts, and security as provided for county depositories. If the treasurer of the authority is some other person, all funds shall be deposited in such bank or banks authorized to do business in this state that have qualified for insured deposits under any federal deposit insurance act as the authority, by resolution, shall designate.

An authority may provide and require a reasonable bond of any other person handling moneys or securities of the authority, but the authority shall pay the premium on the bond.

The county or counties and each city or town which is included in the authority shall contribute such sums towards the expense for maintaining and operating the public transportation system as shall be agreed upon between them.

[ 1983 c 151 § 1; 1975 1st ex.s. c 270 § 23.]

## **NOTES:**

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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## **36.57A.140**

### **Annexation of additional area.**

(1) An election to authorize the annexation of territory contiguous to a public transportation benefit area may be called within the area to be annexed pursuant to resolution or petition in the following manner:

(a) By resolution of a public transportation benefit area authority when it determines that the best interests and general welfare of the public transportation benefit area would be served. The authority

shall consider the question of areas to be annexed to the public transportation benefit area at least once every two years.

(b) By petition calling for such an election signed by at least four percent of the qualified voters residing within the area to be annexed and filed with the auditor of the county wherein the largest portion of the public transportation benefit area is located, and notice thereof shall be given to the authority. Upon receipt of such a petition, the auditor shall examine it and certify to the sufficiency of the signatures thereon.

(c) By resolution of a public transportation benefit area authority upon request of any city for annexation thereto.

(2) If the area proposed to be annexed is located within another county, the petition or resolution for annexation as set forth in subsection (1) of this section must be approved by the legislative authority of the county if the area is unincorporated or by the legislative authority of the city or town if the area is incorporated. Any annexation under this subsection must involve contiguous areas.

(3) The resolution or petition shall describe the boundaries of the area to be annexed. It shall require that there also be submitted to the electorate of the territory sought to be annexed a proposition authorizing the inclusion of the area within the public transportation benefit area and authorizing the imposition of such taxes authorized by law to be collected by the authority.

[ 1991 c 318 § 17; 1983 c 65 § 5; 1975 1st ex.s. c 270 § 24.]

#### NOTES:

**Intent—1991 c 318:** See note following RCW 36.57A.040.

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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### 36.57A.150

#### Advanced financial support payments.

Counties that have established a county transportation authority pursuant to chapter 36.57 RCW and public transportation benefit areas that have been established pursuant to this chapter are eligible to receive a one-time advanced financial support payment from the state to assist in the development of the initial comprehensive transit plan required by RCW 36.57.070 and 36.57A.060. The amount of this support payment is established at one dollar per person residing within each county or public transportation benefit area, as determined by the office of financial management, but no single payment shall exceed fifty thousand dollars. Repayment of an advanced financial support payment shall be made to the public transportation account in the general fund or, if such account does not exist, to the general fund by each agency within two years of the date such advanced payment was received. Such repayment shall be waived within two years of the date such advanced payment was received if the voters in the appropriate counties or public transportation benefit areas do not elect to levy and collect taxes enabled under authority of this chapter and RCW 35.95.040 and 82.14.045. The state department of transportation shall provide technical assistance in the preparation of local transit plans, and administer the advanced financial support payments authorized by this section.

[ 1985 c 6 § 6; 1979 c 151 § 41; 1975 1st ex.s. c 270 § 25.]

#### NOTES:

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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## 36.57A.160

### Dissolution and liquidation.

A public transportation benefit area established pursuant to this chapter may be dissolved and its affairs liquidated when so directed by a majority of persons in the benefit area voting on such question. An election placing such question before the voters may be called in the following manner:

- (1) By resolution of the public transportation benefit area authority;
- (2) By resolution of the county legislative body or bodies with the concurrence therein by resolution of the city council of a component city; or
- (3) By petition calling for such election signed by at least ten percent of the qualified voters residing within the area filed with the auditor of the county wherein the largest portion of the public transportation benefit area is located. The auditor shall examine the same and certify to the sufficiency of the signatures thereon: PROVIDED, That to be validated, signatures must have been collected within a ninety day period as designated by the petition sponsors.

Any dissolution of a public transportation benefit area authority shall be carried out in accordance with the procedures in chapter 53.48 RCW. Any remaining deficit of the authority determined pursuant to RCW 53.48.080 shall be paid from the moneys collected from the tax source under which the authority operated.

[ 1977 ex.s. c 44 § 5; 1975 1st ex.s. c 270 § 26.]

#### NOTES:

**Severability—Effective date—1977 ex.s. c 44:** See notes following RCW 36.57A.030.

**Severability—Effective date—1975 1st ex.s. c 270:** See notes following RCW 35.58.272.

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## 36.57A.170

### Rail fixed guideway public transportation system—Safety program plan and security and emergency preparedness plan.

(1) Each public transportation benefit area that owns or operates a rail fixed guideway public transportation system as defined in RCW 81.104.015 shall submit a system safety program plan and a system security and emergency preparedness plan for that guideway to the state department of transportation by September 1, 1999, or at least one hundred eighty calendar days before beginning operations or instituting significant revisions to its plans. These plans must describe the public transportation benefit area's procedures for (a) reporting and investigating any reportable incident, accident, or security breach and identifying and resolving hazards or security vulnerabilities discovered during planning, design, construction, testing, or operations, (b) developing and submitting corrective action plans and annual safety and security audit reports, (c) facilitating on-site safety and security reviews by the state department of transportation and the federal transit administration, and (d) addressing passenger and employee safety and security. The plans must, at a minimum, conform to the standards adopted by the state department of transportation as set forth in the most current version of the Washington state rail safety oversight program standard manual as it exists on March 25, 2016, or such subsequent date as may be provided by the department by rule, consistent with the purposes of this section. If required by the department, the public transportation benefit area shall revise its plans to



incorporate the department's review comments within sixty days after their receipt, and resubmit its revised plans for review.

(2) Each public transportation benefit area shall implement and comply with its system safety program plan and system security and emergency preparedness plan. The public transportation benefit area shall perform internal safety and security audits to evaluate its compliance with the plans, and submit its audit schedule to the department of transportation pursuant to the requirements in the most current version of the Washington state rail safety oversight program standard manual as it exists on March 25, 2016, or such subsequent date as may be provided by the department by rule, consistent with the purposes of this section. The public transportation benefit area shall prepare an annual report for its internal safety and security audits undertaken in the prior year and submit it to the department no later than February 15th. The department shall establish the requirements for the annual report. The contents of the annual report must include, at a minimum, the dates the audits were conducted, the scope of the audit activity, the audit findings and recommendations, the status of any corrective actions taken as a result of the audit activity, and the results of each audit in terms of the adequacy and effectiveness of the plans.

(3) Each public transportation benefit area shall notify the department of transportation, pursuant to the most current version of the Washington state rail safety oversight program standard manual as it exists on March 25, 2016, or such subsequent date as may be provided by the department by rule, consistent with the purposes of this section, any reportable incident, accident, security breach, hazard, or security vulnerability. The department may adopt rules further defining any reportable incident, accident, security breach, hazard, or security vulnerability. The public transportation benefit area shall investigate any reportable incident, accident, security breach, hazard, or security vulnerability and provide a written investigation report to the department as described in the most current version of the Washington state rail safety oversight program standard manual as it exists on March 25, 2016, or such subsequent date as may be provided by the department by rule, consistent with the purposes of this section.

(4) The system security and emergency preparedness plan required in subsection (1) of this section is exempt from public disclosure under chapter 42.56 RCW. However, the system safety program plan as described in this section is not subject to this exemption.

[ 2016 c 33 § 6; 2007 c 422 § 5; 2005 c 274 § 271; 1999 c 202 § 5.]

#### NOTES:

**Effective date—2016 c 33:** See note following RCW 81.104.115.

**Part headings not law—Effective date—2005 c 274:** See RCW 42.56.901 and 42.56.902.

**Effective date—1999 c 202:** See note following RCW 35.21.228.

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### 36.57A.180

#### Public transportation for persons with special needs.

(1) Effective January 1, 2001, in addition to any other authority granted under this chapter, a newly formed public transportation benefit area, or an existing public transportation benefit area that has not yet successfully submitted an authorizing proposition to the voters under RCW 82.14.045, may purchase, acquire, maintain, operate, or lease transportation services, equipment, and facilities for public transportation limited only to persons with special needs by any method or combination of methods provided by the area authority.

(2) As used in this section, "persons with special needs" means those persons, including their personal attendants, who because of physical or mental disability, income status, or age are unable to transport themselves or purchase transportation.

(3) The public transportation benefit area may fix, regulate, and control fares and rates to be charged for these transportation services.

[ 2001 c 89 § 2.]

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## 36.57A.191

### Maintenance plan.

As a condition of receiving state funding, a public transportation benefit area authority shall submit a maintenance and preservation management plan for certification by the department of transportation. The plan must inventory all transportation system assets within the direction and control of the authority, and provide a preservation plan based on lowest life-cycle cost methodologies.

[ 2006 c 334 § 9; 2003 c 363 § 304.]

#### NOTES:

**Effective date—2006 c 334:** See note following RCW 47.01.051.

**Finding—Intent—2003 c 363:** See note following RCW 35.84.060.

**Part headings not law—Severability—2003 c 363:** See notes following RCW 47.28.241.

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## 36.57A.200

### Passenger-only ferry service—Authorized—Investment plan.

A public transportation benefit area having a boundary located on Puget Sound may provide passenger-only ferry service. For the purposes of this chapter and RCW 82.14.440 and 82.80.130, Puget Sound is considered as extending north as far as the Canadian border and west as far as Port Angeles. Before a benefit area may provide passenger-only ferry service, it must develop a passenger-only ferry investment plan including elements to operate or contract for the operation of passenger-only ferry services, purchase, lease, or rental of ferry vessels and dock facilities for the provision of transit service, and identify other activities necessary to implement the plan. The plan must set forth terminal locations to be served, projected costs of providing services, and revenues to be generated from tolls, locally collected tax revenues, and other revenue sources. The plan must ensure that services provided under the plan are for the benefit of the residents of the benefit area. The benefit area may use any of its powers to carry out this purpose, unless otherwise prohibited by law. In addition, the public transportation benefit area may enter into contracts and agreements to operate passenger-only ferry service and public-private partnerships and design-build, general contractor/construction management, or other alternative procurement process substantially consistent with chapter 39.10 RCW.

[ 2003 c 83 § 201.]

#### NOTES:

**Findings—Intent—2003 c 83:** "The legislature finds that passenger-only ferry service is a key element to the state's transportation system and that it is in the interest of the state to ensure provision of such services. The legislature further finds that diminished state transportation resources require that regional and local authorities be authorized to develop, operate, and fund needed services.

The legislature recognizes that if the state eliminates passenger-only ferry service on one or more routes, it should provide an opportunity for locally sponsored service and the department of transportation should assist in this effort.

It is the intent of the legislature to encourage interlocal agreements to ensure passenger-only ferry service is reinstated on routes that the Washington state ferry system eliminates." [ **2003 c 83 § 101.**]

**Captions, part headings not law—2003 c 83:** "Captions and part headings used in this act are not part of the law." [ **2003 c 83 § 401.**]

**Severability—2003 c 83:** "If any provision of this act or its application to any person or circumstance is held invalid, the remainder of the act or the application of the provision to other persons or circumstances is not affected." [ **2003 c 83 § 402.**]

**Effective date—2003 c 83:** "This act is necessary for the immediate preservation of the public peace, health, or safety, or support of the state government and its existing public institutions, and takes effect immediately [April 23, 2003]." [ **2003 c 83 § 403.**]

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## **36.57A.210**

### **Passenger-only ferry service—Taxes, fees, and tolls.**

(1) A public transportation benefit area may, as part of a passenger-only ferry investment plan, recommend some or all of the following revenue sources as provided in this chapter:

- (a) A motor vehicle excise tax, as provided in RCW **82.80.130**;
- (b) A sales and use tax, as provided in RCW **82.14.440**;
- (c) Tolls for passengers and packages and, where applicable, parking; and
- (d) Charges or licensing fees for advertising, leasing space for services to ferry passengers, and other revenue-generating activities.

(2) Taxes may not be imposed without an affirmative vote of the majority of the voters within the boundaries of the area voting on a single ballot proposition to both approve a passenger-only ferry investment plan and to approve taxes to implement the plan. Revenues from these taxes and fees may be used only to implement the plan and must be used for the benefit of the residents of the benefit area. A district may contract with the state department of revenue or other appropriate entities for administration and collection of any of the taxes or charges authorized in this section.

[ **2003 c 83 § 202.**]

#### **NOTES:**

**Findings—Intent—Captions, part headings not law—Severability—Effective date—2003 c 83:** See notes following RCW **36.57A.200.**

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## **36.57A.220**

### **Passenger-only ferry service between Kingston and Seattle.**

A public transportation benefit area seeking grant funding as described in RCW 47.01.350 for a passenger-only ferry route between Kingston and Seattle shall first receive approval from the governor after submitting a complete business plan to the governor and the legislature by November 1, 2007. The business plan must, at a minimum, include hours of operation, vessel needs, labor needs, proposed routes, passenger terminal facilities, passenger rates, anticipated federal and local funding, coordination with the Washington state ferry system, coordination with existing transit providers, long-term operation and maintenance needs, and a long-term financial plan.

[ 2007 c 223 § 1; 2006 c 332 § 8.]

#### NOTES:

**Effective date—2007 c 223:** "This act is necessary for the immediate preservation of the public peace, health, or safety, or support of the state government and its existing public institutions, and takes effect immediately [April 27, 2007]." [ 2007 c 223 § 11.]

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### 36.57A.222

#### **Passenger-only ferry service districts—Authorized—Investment plan—Dissolution.**

(1) A governing body of a public transportation benefit area, located in a county that only borders the western side of Puget Sound with a population of more than two hundred thousand and contains one or more Washington state ferries terminals, may establish one or more passenger-only ferry service districts within all or a portion of the boundaries of the public transportation benefit area establishing the passenger-only ferry service district. A passenger-only ferry service district may include all or a portion of a city or town as long as all or a portion of the city or town boundaries are within the boundaries of the establishing public transportation benefit area. The members of the public transportation benefit area governing body proposing to establish the passenger-only ferry service district, acting ex officio and independently, constitutes the governing body of the passenger-only ferry service district.

(2) A passenger-only ferry service district may establish, finance, and provide passenger-only ferry service, and associated services to support and augment passenger-only ferry service operation, within its boundaries in the same manner as authorized for public transportation benefit areas under this chapter.

(3) A passenger-only ferry service district constitutes a body corporate and possesses all the usual powers of a corporation for public purposes as well as all other powers that may be conferred by statute including, but not limited to, the authority to hire employees, staff, and services, to enter into contracts, to acquire, hold, and dispose of real and personal property, and to sue and be sued. Public works contract limits applicable to the public transportation benefit area that established the passenger-only ferry service district apply to the district. For purposes of this section, "passenger-only ferry service district" means a quasi-municipal corporation and independent taxing authority within the meaning of Article VII, section 1 of the state Constitution, and a taxing district within the meaning of Article VII, section 2 of the state Constitution, created by the legislative body of a public transportation benefit area.

(4) Before a passenger-only ferry service district may provide passenger-only ferry service, it must develop a passenger-only ferry investment plan, including elements: To operate or contract for the operation of passenger-only ferry services; to purchase, lease, or rent ferry vessels and dock facilities for the provision of transit service; and to identify other activities necessary to implement the plan. The plan must set forth terminal locations to be served, projected costs of providing services, and revenues to be generated from tolls, locally collected tax revenues, and other revenue sources. The plan must ensure that services provided under the plan are for the benefit of the residents of the passenger-only ferry service district. The passenger-only ferry service district may use any of its powers to carry out this

purpose, unless otherwise prohibited by law. In addition, the passenger-only ferry service district may enter into: Contracts and agreements to operate passenger-only ferry service; public-private partnerships; and design-build, general contractor/construction management, or other alternative procurement processes substantially consistent with chapter 39.10 RCW.

(5) A passenger-only ferry service district may be dissolved by a majority vote of the governing body when all obligations under any general obligation bonds issued by the passenger-only ferry service district have been discharged and any other contractual obligations of the passenger-only ferry service district have either been discharged or assumed by another governmental entity.

[ 2015 3rd sp.s. c 44 § 313.]

#### NOTES:

**Effective date—2015 3rd sp.s. c 44:** See note following RCW 46.68.395.

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### 36.57A.224

#### Passenger-only ferry service districts—Revenue.

(1) A passenger-only ferry service district may, as part of a passenger-only ferry investment plan, recommend some or all of the following revenue sources as provided in this chapter:

- (a) A sales and use tax, as authorized in RCW 82.14.445;
- (b) A parking tax, as authorized in RCW 82.80.035;
- (c) Tolls for passengers, packages, and, where applicable, parking; and
- (d) Charges or licensing fees for advertising, leasing space for services to ferry passengers, and other revenue generating activities.

(2) Taxes may not be imposed without an affirmative vote of the majority of the voters within the boundaries of the passenger-only ferry service district voting on a single ballot proposition to both approve a passenger-only ferry investment plan and to approve taxes to implement the plan. Revenues from these taxes and fees may be used only to implement the plan and must be used for the benefit of the residents of the passenger-only ferry service district. A district must contract with the department of revenue for the administration and collection of a sales and use tax as authorized in RCW 82.14.445. A district may contract with other appropriate entities for the administration and collection of any of the other taxes or charges authorized in this section.

[ 2015 3rd sp.s. c 44 § 314.]

#### NOTES:

**Effective date—2015 3rd sp.s. c 44:** See note following RCW 46.68.395.

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### 36.57A.226

#### Passenger-only ferry service districts—Issuance of bonds.

(1) To carry out the purposes of this chapter, a passenger-only ferry service district may issue general obligation bonds, not to exceed an amount, together with any other outstanding nonvoter-approved general obligation indebtedness, equal to one and one-half percent of the value of the taxable property within the area, as the term "value of the taxable property" is defined in RCW 39.36.015. A

passenger-only ferry service district may also issue general obligation bonds for capital purposes only, together with any outstanding general obligation indebtedness, not to exceed an amount equal to five percent of the value of the taxable property within the area, as the term "value of the taxable property" is defined in RCW 39.36.015, when authorized by the voters of the area pursuant to Article VIII, section 6 of the state Constitution.

(2) General obligation bonds with a maturity in excess of twenty-five years may not be issued. The governing body of the passenger-only ferry service district must by resolution determine for each general obligation bond issue the amount, date, terms, conditions, denominations, maximum fixed or variable interest rate or rates, maturity or maturities, redemption rights, registration privileges, manner of execution, manner of sale, callable provisions, if any, covenants, and form, including registration as to principal and interest, registration as to principal only, or bearer. Registration may include, but not be limited to: (a) A book entry system of recording the ownership of a bond whether or not physical bonds are issued, or (b) recording the ownership of a bond together with the requirement that the transfer of ownership may only be effected by the surrender of the old bond and either the reissuance of the old bond or the issuance of a new bond to the new owner. Facsimile signatures may be used on the bonds and any coupons. Refunding general obligation bonds may be issued in the same manner as general obligation bonds are issued.

(3) Whenever general obligation bonds are issued to fund specific projects or enterprises that generate revenues, charges, user fees, or special assessments, the passenger-only ferry service district may specifically pledge all or a portion of the revenues, charges, user fees, or special assessments to refund the general obligation bonds. The passenger-only ferry service district may also pledge any other revenues that may be available to the district.

(4) In addition to general obligation bonds, a passenger-only ferry service district may issue revenue bonds to be issued and sold in accordance with chapter 39.46 RCW.

[ 2015 3rd sp.s. c 44 § 317.]

#### NOTES:

**Effective date—2015 3rd sp.s. c 44:** See note following RCW 46.68.395.

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### 36.57A.230

#### Public transportation fares—Proof of payment—Civil infractions.

(1) Persons traveling on public transportation operated by a public transportation benefit area shall pay the fare established by the public transportation benefit area and shall produce proof of payment in accordance with the terms of use established by the public transportation benefit area. Such persons shall produce proof of payment when requested by a person designated to monitor fare payment. The required manner of producing proof of payment specified in the terms of use established by the public transportation benefit area may include, but is not limited to, requiring a person using an electronic fare payment card to validate the card by presenting the card to an electronic card reader before or upon entering a public transportation vehicle or a restricted fare paid area.

(2) The following constitute civil infractions punishable according to the schedule of fines and penalties established by a public transportation benefit area under RCW 36.57A.235:

(a) Failure to pay the required fare, except when a public transportation benefit area fails to meet the requirements of subsection (3) of this section;

(b) Failure to produce proof of payment in the manner required by the terms of use established by the public transportation benefit area including, but not limited to, the failure to produce a validated fare payment card when requested to do so by a person designated to monitor fare payment; and

(c) Failure to depart the bus or other mode of public transportation when requested to do so by a person designated to monitor fare payment.

(3) If fare payment is required before entering a transit vehicle, as defined in RCW 9.91.025(2)(b), or before entering a fare paid area in a transit facility, as defined in RCW 9.91.025(2)(a), signage must be conspicuously posted at the place of boarding or within ten feet of the nearest entrance to a transit facility that clearly indicates: (a) The locations where tickets or fare media may be purchased; and (b) that a person using an electronic fare payment card must present the card to an electronic card reader before entering a transit vehicle or before entering a restricted fare paid area.

[ 2012 c 68 § 2; 2008 c 123 § 6.]

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### **36.57A.235**

#### **Public transportation fares—Schedule of fines and penalties—Who may monitor fare payment—Administration of citations.**

(1) A public transportation benefit area may establish, by resolution, a schedule of fines and penalties for civil infractions established in RCW 36.57A.230. Fines established shall not exceed those imposed for class 1 infractions under RCW 7.80.120.

(2)(a) A public transportation benefit area may designate persons to monitor fare payment who are equivalent to, and are authorized to exercise all the powers of, an enforcement officer as defined in RCW 7.80.040. A public transportation benefit area may employ personnel to either monitor fare payment or contract for such services, or both.

(b) In addition to the specific powers granted to enforcement officers under RCW 7.80.050 and 7.80.060, persons designated to monitor fare payment may also take the following actions:

- (i) Request proof of payment from passengers;
- (ii) Request personal identification from a passenger who does not produce proof of payment when requested;
- (iii) Issue a citation conforming to the requirements established in RCW 7.80.070; and
- (iv) Request that a passenger leave the bus or other mode of public transportation when the passenger has not produced proof of payment after being asked to do so by a person designated to monitor fare payment.

(3) A public transportation benefit area shall keep records of citations in the manner prescribed by RCW 7.80.150. All civil infractions established by this section and RCW 36.57A.230 and 36.57A.240 shall be heard and determined by a district court as provided in RCW 7.80.010 (1) and (4).

[ 2008 c 123 § 7.]

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### **36.57A.240**

#### **Public transportation fares—Powers of law enforcement authorities.**

RCW 36.57A.230 and 36.57A.235 do not prevent law enforcement authorities from prosecuting for theft, trespass, or other charges by any individual who:

- (1) Fails to pay the required fare on more than one occasion within a twelve-month period;
- (2) Fails to timely select one of the options for responding to the notice of civil infraction after receiving a statement of the options for responding to the notice of infraction and the procedures necessary to exercise these options; or

(3) Fails to depart the bus or other mode of public transportation when requested to do so by a person designated to monitor fare payment.

[ 2008 c 123 § 8.]

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### **36.57A.245**

#### **Public transportation fares—Powers and authority are supplemental to other laws.**

The powers and authority conferred by RCW 36.57A.230 through 36.57A.240 shall be construed as in addition and supplemental to powers or authority conferred by any other law, and nothing contained therein shall be construed as limiting any other powers or authority of any public agency.

[ 2008 c 123 § 9.]

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### **36.57A.250**

#### **Supplemental transportation improvements.**

If the legislative authority of a city provides or contracts for supplemental transportation improvements, as described in RCW 35.21.925 or under chapter 36.73 RCW, a public transportation benefit area serving the city or border jurisdictions shall coordinate its services with the supplemental transportation improvements to maximize efficiencies in public transportation services within and across service boundaries.

[ 2010 c 251 § 5.]

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# INTERCITY TRANSIT Fact Sheet

Intercity Transit serves Washington State's capital city, Olympia, and neighboring cities Lacey, Tumwater, and Yelm. Intercity Transit is a nationally recognized, small urban transit system with diverse services and strong ridership. In addition to serving the local area for 34 years, Intercity Transit connects with five area transit systems, including Sound Transit, providing access to Central Puget Sound.

## Mission & Vision

Our **mission** is to provide and promote public transportation choices that support an accessible, sustainable, livable, healthy, prosperous community. Our **vision** is to be a leading transit system in the country, recognized for our well-trained, highly motivated, customer-focused, community-minded employees committed to enhancing the quality of life for all citizens of Thurston County.

## Operating Background

In 34 years of service, we have provided more than 101.3 million rides for area residents and commuters. The agency employs about 315 people.

## Intercity Transit Authority

The Intercity Transit Authority, our governing body, consists of five elected officials who represent the Cities of Olympia, Lacey, Tumwater, and Yelm and Thurston County. Three citizen-at-large members and a labor representative also serve on the Authority. The Citizen Advisory Committee, a 20-member citizen advisory panel, provides input to the Authority.

## Budget

Our 2015 budget is \$55 million. This includes an operating budget of \$39 million and capital budget of \$16 million.

## Ridership

In 2014, we provided about 5.4 million rides on fixed-route, paratransit, and vanpool services. Ridership has increased 5.9 percent in the past five years and 59 percent in the past ten years.

## System Facilities

### Intercity Transit operates:

- A fleet of 106 buses (71 coaches [including 23 hybrids] and 35 Dial-A-Lift vans); 256 vanpool vans.
- Five transit centers.
- An administrative and maintenance facility.
- 940 bus stops, 275 bus shelters, and 3 park & ride lots.
- Bike racks and accessible features on all buses.
- Amtrak Centennial Station.



## Who Uses Intercity Transit

Eighty percent of trips are for economic purposes. People use transit to get to work (34%), go shopping (23%) and conduct personal business (23%). Since 2004, the number of transit trips associated with economic activity increased dramatically, including a 61 percent increase in work trips and a 67 percent increase in school trips. Eighty-six percent of riders surveyed rate Intercity Transit as "good" or "excellent". (Source: Rider Survey, 2008)

## Benefits of Public Transportation

Public transportation, an essential part of our transportation network, plays an important role in the county's economic, environmental, and social health by:

- Providing commuter and lifeline services.
- Providing transportation to jobs, schools, personal, business, and community activities.
- Reducing traffic congestion so private automobiles and freight can travel more efficiently.
- Helping seniors and people with disabilities remain independent.
- Protecting the environment by moving people efficiently, reducing air pollution, gas consumption, and harmful emissions.
- Acting as an engaged community partner and a responsible public steward.

## Bus Service

Fixed-route bus service is available weekdays on 24 routes, slightly fewer on weekends. These routes serve the greater urban centers of Thurston County, provide express service to Lakewood/Tacoma, and make connections to neighboring transit services. In 2014, 4.47 million trips were taken on fixed-route bus service.

## Vanpool & Carpool Service

Approximately 214 vanpools serve about 1,700 commuters traveling daily throughout the south Puget Sound and southwest Washington region. This program provided about 747,000 passenger trips in 2014. We also participate in a ridematch program helping commuters find potential vanpool and carpool partners.

## Dial-A-Lift Service

Dial-A-Lift provides door-to-door service for customers whose disabilities prevent them from using our fixed-route service. This service, which exceeds the federal requirements for complementary service, provided about 160,000 trips in 2014.

## Village Vans Program

The Village Vans program serves individuals working toward economic independence. Participants must be actively seeking jobs or training. The program also provides on-the-job driver training for the participants who drive the vans.

## Community Van Service

We make retired vanpool vans available to non-profit and governmental organizations on a reservation basis. A per-mile rate covers direct costs of operating the service.

## Travel Training Program

This free, one-on-one or small-group training teaches the practical skills of riding our buses safely and confidently.

## Commute Trip Reduction & Pass Programs

We work with about 200 worksites implementing trip-reduction programs for thousands of commuters. We also partner with all three area colleges and several major employers on bus pass programs.

## Youth Education Program

Walk 'n' Roll, our Youth Education program, is dedicated to building the next generation of safe and healthy bikers, walkers, and bus riders. This program offers hands-on activities and environmental lessons, hosts field trips and events, and engages young people of all ages.



## Awards

We have earned recognition for our efforts on the local, state, and national levels:

- 2014 International Organization for Standardization ISO 14001 Certification, one of nine transit systems in the nation
- 2013 American Public Works Assn. Project of Year
- 2012 Gold Sustainable Commitment Recognition
- 2012 Thurston County Green Business of the Year
- 2009 American Public Transportation Assn. Outstanding Public Transportation System Achievement Award
- 2009 Federal Transit Administration Enhancing Ridership Award
- 2008 & 2007 American Public Transportation Assn. Ad Wheel Grand Prize Awards
- 2008-12 Thurston County Green Business Award
- 2003 Washington State Department of Ecology Environmental Excellence Award
- 2002 Governor's Commute Smart Award

**INTERcity**  
**TRANSIT**

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Web site: [intercitytransit.com](http://intercitytransit.com)

**Business Office** 526 Pattison St. SE, Olympia

Phone: 360.786.8585

Intercity Transit ensures no person is excluded from participation in, or denied the benefits of its transit services on the basis of race, color, or national origin consistent with requirements of Title VI of the Civil Rights Act of 1964 and Federal Transit Administration guidance in Circular 4702.

For questions, contact Intercity Transit's Title VI Officer at (360) 705-5885 or [bholman@intercitytransit.com](mailto:bholman@intercitytransit.com).

**Intercity  
Transit**

**2017**

**Budget**

**December 2016**



# ***Intercity Transit***

## ***2017 Budget Summary***

### **Introduction**

Intercity Transit's 2017 budget is driven by the policy and action strategies outlined in its 2017-2022 Transit Development Plan (TDP) and 2017-2022 Strategic Plan. Updated each September, the TDP defines the basic public transportation services Intercity Transit will provide over the next six years using a financially constrained operating model. The Strategic Plan, adopted in December, includes specific detail on agency policy positions, service levels and corresponding resource expenditures, and the updated financial plan for the next six years. The Strategic Plan also defines Intercity Transit's capital program and the infrastructure investments necessary to implement the corresponding service levels and policies. The financial forecast for the first year of the Strategic Plan sets the limit on budget expenditures for the 2017 budget.

The 2017 budget includes three new positions – one new Dial-A-Lift Operator, a new Vehicle Maintenance Service Worker and a new Dial-A-Lift Dispatch Specialist. It also includes a significant capital program with the replacement of the Computer Aided Dispatch/ Automated Vehicle Locator system, upgrading the radio system from analog to digital, completion of the Pattison Street Facility final design and other Pattison Street Facility enhancements, mid-life rebuild on six hybrid buses, replacement of the fare box collection system, replacement of seven Dial-A-Lift vans and 20 vanpool vans as well as numerous other projects. Capital projects from the 2017 Strategic plan total \$16.9 million.

The 2017 budget details the expenditures required to implement the service levels and policies outlined in the first year (2017) of the six year Transit Development and Strategic Plans. The budget development process is an opportunity for the public and the Intercity Transit Authority to determine whether or not the benefits of implementing the policies, service levels and capital projects defined in these plans justify the costs.

### **Background**

The 2017 budget includes a significant amount of capital funding carried over from 2016, including \$8.5 million for the Olympia Transit Center expansion, \$8.8 million for the Underground Storage Tank replacement project and several other projects. Total capital projects rolled over from 2016 is \$20.2 million. The 2017

capital budget, including 2016 roll over projects is \$32.8 million. The budget also includes:

- Replace Computer Aided Dispatch/ Automated vehicle locator/ Radio System.
- Conduct final design of the Pattison Street Facility Project.
- Perform mid-life rebuild on six Hybrid Diesel coaches.
- Replacement/modernization of the fare box collection system.
- Purchase seven Dial-A-Lift vans
- Purchase twenty vans for the vanpool program.

### **2017 Budget Highlights**

The proposed 2017 Intercity Transit total budget is \$78,179,017 of which \$45,400,839 is for operations and \$32,778,178 is for capital improvements. This budget includes:

- A slight increase in Dial-A-Lift service.
- Projection of a 3.0-percent increase in sales tax revenue.
- Completion of the Olympia Transit Center expansion design and engineering work and significant construction progress.
- Purchase of seven Dial-a-Lift vans.

### **New Staff Positions**

The 2017 budget includes one additional operator due to the increase in Dial-A-Lift service hours, a new Dial-A-Lift Dispatch Specialist and a Vehicle Maintenance Service Worker.

### **CONCLUSION**

The 2017 budget supports delivering quality transportation services and implementing capital projects, some of which are funded through existing grants. A modest increase in Dial-A-Lift service is also in the budget.

Intercity Transit enters 2017 in a stable financial position. However, the future of our service is at risk due to the significant reduction in federal transportation dollars and the elimination of discretionary funding for bus and bus facilities projects. These conditions create a significant challenge for funding both future

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bus purchases and the renovation and expansion of the Pattison Street maintenance and operating facility

This budget addresses the transportation needs of our growing community and continues Intercity Transit's commitment to sustainability and sound environmental practices. We continue to be a public transportation agency that is much more than a "bus company" – one that is committed to providing mobility to all and supporting a healthy, livable and prosperous community environmentally, economically and socially.

This budget will help us fulfill Intercity Transit's Mission and Vision:

*Our mission is to provide and promote transportation choices that support an accessible, sustainable, livable, healthy, prosperous community.*

*Our vision is to be a leading transit system in the country, recognized for our well trained, highly motivated, customer-focused, community-minded employees committed to enhancing the quality of life for all citizens of Thurston County.*

We will strive to continue to provide service that meets the mobility needs of our community and improves the quality of life of our citizens to the fullest extent possible within our budgetary limitations.

**Intercity Transit 2017 Budget**  
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# **Agency Summaries**

# Intercity Transit

Serving Thurston County, Washington

## Service Information

	2016	2017	
<i>Vehicle Service Hours by Mode</i>	<i>Programmed</i>	<i>Programmed</i>	<i>Change</i>
Fixed Route	218,115	218,115	0.0%
Dial-A-Lift	76,100	78,100	2.6%
<b>Total Vehicle Service Hours</b>	<b>294,215</b>	<b>296,215</b>	<b>0.7%</b>

## Financial Information

	2016	2017	
<i>Operating Funds</i>	<i>Budget</i>	<i>Budget</i>	<i>Change</i>
Operating Revenues	5,369,080	5,143,613	-4.2%
Non-Transportation Revenues	701,466	508,329	-27.5%
Subsidies	38,288,446	40,387,658	5.5%
<b>Total Operating Funds</b>	<b>\$44,358,992</b>	<b>\$46,039,600</b>	<b>3.8%</b>

### Operating Expenses

Salaries/Wages/Benefits	\$26,845,259	\$28,677,933	6.8%
Operating Supplies	6,807,550	10,257,810	50.7%
Other Services/Charges	6,124,994	6,465,096	5.6%
<b>Total Operating Expenses</b>	<b>\$39,777,803</b>	<b>\$45,400,839</b>	<b>14.1%</b>

### Capital Funds

Unreserved Funds	\$10,194,546	\$23,642,734	131.9%
Grants	8,868,962	9,135,444	3.0%
<b>Total Capital Funds</b>	<b>\$19,063,508</b>	<b>\$32,778,178</b>	<b>71.9%</b>

### Capital Expenses

Revenue Equipment	\$2,176,126	\$2,525,333	16.0%
Facilities	15,949,782	22,128,282	38.7%
Other	937,600	8,124,563	766.5%
<b>Total Capital Expenses</b>	<b>\$19,063,508</b>	<b>\$32,778,178</b>	<b>71.9%</b>

<b><i>Budget Summary - Cash Basis</i></b>	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>
<b><i>Beginning Cash Balance</i></b>	<b>\$28,113,306</b>	<b>\$42,707,771</b>	<b>\$49,899,448</b>
<b><i>Add:</i></b>			
Operating Revenues	\$44,358,992	\$45,776,955	\$46,039,600
Grants	8,868,962	702,350	9,135,444
<b><i>Total</i></b>	<b>\$53,227,954</b>	<b>\$46,479,305</b>	<b>\$55,175,044</b>
<b><i>Less:</i></b>			
Operating Expenditures	\$40,007,803	\$36,081,750	\$45,400,839
Capital Purchases	18,833,508	3,205,878	32,778,178
<b><i>Total</i></b>	<b>\$58,841,311</b>	<b>\$39,287,628</b>	<b>\$78,179,017</b>
<b><i>Ending Cash Balance</i></b>	<b>\$22,499,949</b>	<b>\$49,899,448</b>	<b>\$26,895,475</b>
<b><i>Less Operating Reserve</i></b>	<b>\$ (10,001,951)</b>	<b>\$ (9,020,438)</b>	<b>\$ (11,350,210)</b>
<b><i>Ending Unreserved Cash Balance</i></b>	<b>\$12,497,998</b>	<b>\$40,879,010</b>	<b>\$15,545,265</b>

<b>Summary of Expenses</b>	<b>2016</b>			<b>2016</b>
	<b>2016 Budget</b>	<b>Projected</b>	<b>2017 Budget</b>	<b>Projected vs. 2017 Budget</b>
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages - Operators	9,884,849	10,141,656	10,379,367	2.34%
Fringe Benefits - Operators	4,299,014	4,299,014	4,782,065	11.24%
Salaries/Wages - Maintenance	2,617,952	2,632,495	2,719,652	3.31%
Fringe Benefits - Maintenance	987,393	1,015,234	1,134,412	11.74%
Salaries/Wages - Admin/Supervisors	6,721,913	6,674,494	7,004,077	4.94%
Fringe Benefits - Admin/Supervisors	2,225,038	2,277,077	2,545,886	11.81%
Uniforms/Clothing	90,560	92,170	93,378	1.31%
Tool/Boot Allowance	18,540	18,648	19,096	2.40%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>26,845,259</b>	<b>27,150,788</b>	<b>28,677,933</b>	<b>5.62%</b>
<b>Services</b>				
Advertising Services	47,500	5,883	93,000	1480.83%
Professional Services	1,949,750	938,837	2,214,786	135.91%
Accounting/Audit	31,500	22,239	32,000	43.89%
Repair/Maintenance by Others	583,240	293,372	2,113,693	620.48%
Sponsorships	8,000	3,040	8,000	163.16%
Extra Help	33,100	20,010	33,100	65.42%
Maintenance Contracts	433,973	319,386	433,973	35.88%
Custodial Services	159,700	139,195	160,700	15.45%
Landscaping Services	74,500	65,162	74,500	14.33%
Security	186,000	189,382	193,000	1.91%
Printing	197,477	128,111	198,944	55.29%
Postage	20,000	20,000	20,000	0.00%
Public Works	10,000	0	10,000	100.00%
Fees and Permits	14,500	16,995	16,500	-2.91%
<b>Subtotal - Services</b>	<b>3,749,240</b>	<b>2,161,612</b>	<b>5,602,196</b>	<b>159.17%</b>
<b>Fuel/Oil/Tires</b>				
Fuel/Diesel	2,692,984	1,217,988	2,500,651	105.31%
Fuel/Gasoline	808,598	418,947	741,079	76.89%
Fuel/Propane	0	0	50,000	100.00%
Oils/Lubes	65,199	89,409	85,350	-4.54%
Tires/Tubes	116,435	117,204	172,267	46.98%
<b>Subtotal - Fuel/Oil/tires</b>	<b>3,683,216</b>	<b>1,843,548</b>	<b>3,549,347</b>	<b>92.53%</b>
<b>Supplies</b>				
Operating Supplies	211,720	195,078	215,752	10.60%
Repair/Maintenance Supplies	29,000	36,376	36,000	-1.03%
R/M Supplies Inventory	1,747,134	1,654,115	3,587,799	116.90%
Sales Tax	95,700	108,667	116,215	6.95%
Freight	31,630	25,658	32,279	25.80%
Office Supplies	25,000	21,660	25,000	15.42%
IS Supplies	46,350	73,901	47,750	-35.39%
IS Software	272,500	45,450	314,300	591.53%
Promotional Items	22,500	6,398	13,500	111.00%
Small Tools	26,000	27,923	27,018	-3.24%
Office Equipment	24,900	11,744	47,900	307.87%
IS Equipment	0	19,267	0	-100.00%
Cameras	125,000	11,820	125,150	958.80%
Miscellaneous Equipment	33,900	29,597	36,400	22.99%
<b>Subtotal - Supplies</b>	<b>2,691,334</b>	<b>2,267,654</b>	<b>4,625,063</b>	<b>103.96%</b>

<b>Summary of Expenses</b>	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>	<b>2016 Projected vs. 2017 Budget</b>
<b>Utilities</b>				
Water	63,000	64,372	73,000	13.40%
Recycling/Garbage	25,000	17,098	25,000	46.22%
Natural Gas	76,000	66,824	76,000	13.73%
Electric	168,000	150,146	167,000	11.23%
Phone	81,000	68,856	83,400	21.12%
Communications	20,000	13,280	20,600	55.12%
<b>Subtotal - Utilities</b>	<b>433,000</b>	<b>380,576</b>	<b>445,000</b>	<b>16.93%</b>
<b>Insurance</b>				
Unemployment Ins Exp	50,000	26,227	50,000	90.64%
Liability/Property Insurance	1,100,000	1,100,000	1,200,000	9.09%
<b>Subtotal - Insurance</b>	<b>1,150,000</b>	<b>1,126,227</b>	<b>1,250,000</b>	<b>10.99%</b>
<b>Taxes</b>				
Property Taxes	2,000	1,774	2,000	12.74%
Vehicle Lic/Reg Fees	4,964	2,517	3,633	44.34%
State Excise Tax	45,000	60,317	45,000	-25.39%
<b>Subtotal - Taxes</b>	<b>51,964</b>	<b>64,608</b>	<b>50,633</b>	<b>-21.63%</b>
<b>Miscellaneous</b>				
Purchased Transportation	308,000	306,823	308,000	0.38%
Dues	123,500	121,315	123,500	1.80%
Subscriptions	1,000	681	1,000	46.84%
Travel	174,463	142,155	204,413	43.80%
Tuition/Registration	156,588	119,103	171,213	43.75%
Advertising/Promotion Media	72,300	60,504	20,300	-66.45%
Miscellaneous	77,386	84,391	91,486	8.41%
Commuter Trip Reduction	29,000	20,789	30,000	44.31%
Guaranteed Ride Home	750	616	750	21.75%
Vanpool Incentive Program	14,000	19,523	23,500	20.37%
Rentals	216,803	210,843	226,505	7.43%
<b>Subtotal - Miscellaneous</b>	<b>1,173,790</b>	<b>1,086,743</b>	<b>1,200,667</b>	<b>10.48%</b>
<b>Total Operating Expenses</b>	<b>39,777,803</b>	<b>36,081,756</b>	<b>45,400,839</b>	<b>25.83%</b>

## **REVENUES**

### **Operating Revenues**

The amount of fares collected in 2017 is expected to increase slightly over 2016 due to increased ridership.

Vanpool revenues are projected to decrease because of a reduction in the number of vanpool groups during 2016.

### **Non Transportation Revenue**

Budgeted interest income is expected to decrease relative to the 2016 budgeted level due to unrealistic assumptions for interest rates. The 2017 budget is more consistent with 2016 projected interest income. Amtrak Depot operations will be funded through contracts with local jurisdictions and Agency operating revenues

### **Subsidies**

The 2017 budget assumes that Sales Tax collections will be slightly higher than expected 2016 sales tax revenues. Other subsidies include a state operating grant for Dial-A-Lift services and Capital Preventative Maintenance operating assistance from the Federal Transit Administration.

### **Grants**

For the year 2017, Federal Transit Administration funds for the expansion of the Olympia Transit Center, replacement and renovation of the underground storage tanks, and Vanpool replacement vehicles are expected.

<b>Revenues</b>	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>	<b>2016 Projected vs. 2017 Budget</b>
<b>Operating Revenues</b>				
Passenger Fares	3,129,584	3,116,094	3,211,523	3.06%
Vanpool Fares	1,882,778	1,515,210	1,612,358	6.41%
Exterior/Interior Advertising	356,718	334,783	319,732	-4.50%
<b>Subtotal</b>	<b>5,369,080</b>	<b>4,966,087</b>	<b>5,143,613</b>	<b>3.57%</b>
<b>Non-Transportation Revenue</b>				
Interest Income	514,167	379,985	386,212	1.64%
Amtrak Depot	28,601	41,301	28,601	-30.75%
Miscellaneous	158,698	61,598	93,516	51.82%
<b>Subtotal</b>	<b>701,466</b>	<b>482,884</b>	<b>508,329</b>	<b>5.27%</b>
<b>Subsidies</b>				
Sales Tax	33,593,368	35,399,908	36,269,521	2.46%
State Operating Assistance	385,922	619,922	385,922	-37.75%
Federal Operating Assistance	4,309,156	4,309,156	3,732,215	-13.39%
<b>Subtotal</b>	<b>38,288,446</b>	<b>35,399,908</b>	<b>40,387,658</b>	<b>14.09%</b>
<b>TOTAL OPERATING REVENUES</b>	<b>44,358,992</b>	<b>40,848,879</b>	<b>46,039,600</b>	<b>12.71%</b>
<b>Grants</b>				
FTA	5,709,962	0	9,060,444	0.00%
State of Washington	3,159,000	702,350	75,000	-89.32%
<b>Total Grants Revenue</b>	<b>8,868,962</b>	<b>702,350</b>	<b>9,135,444</b>	<b>1200.70%</b>
<b>TOTAL REVENUES</b>	<b>53,227,954</b>	<b>41,551,229</b>	<b>55,175,044</b>	<b>32.79%</b>

## **CAPITAL**

### **Staff Vehicles**

Acquire five vehicles to replace vehicles purchased in 2007 and earlier.

### **Information Systems Equipment**

Miscellaneous IS equipment will be purchased throughout the agency to improve regular data processing and improve access to computers for supervisors, operators, and employees working off site. Money is also budgeted to replace the Computer Aided Dispatch/Automatic Vehicle Locating (CAD/AVL) and the analog radio system, and to replace the digital video recording system for the cameras.

### **Facility Enhancements**

Improvements include replacing the HVAC system at the Amtrak station and at the Olympia Transit Center, painting the interior of all facilities, adding a new lift to the Maintenance facility and installing additional solar lights in bus shelters. Also, the Pattison Street facility's underground storage tanks will be replaced and the storage facility for lubricants will be renovated.

### **Olympia Transit Center Expansion**

Complete design and environmental review for expansion of the Olympia Transit Center to accommodate intercity bus service (Greyhound) and increase local capacity. Construction on the project is expected to begin in 2017.

### **Revenue and Vanpool Vehicles**

Purchase seven Dial-A-Lift vans and 20 vanpool vehicles.



<b><i>Capital Projects</i></b>	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>
Staff Vehicles	122,100	141,545	208,963
Shop/Garage Equipment	260,000	235,196	135,600
Fareboxes	0	0	1,500,000
Information Systems Equipment	555,500	270,390	6,050,000
Facility Enhancements	225,000	65,330	736,000
Park & Ride Lots	232,500	0	230,000
Pattison Facility Expansion	0	0	4,100,000
Olympia Transit Center Expansion	8,492,282	6,600	8,492,282
Dial A Lift Vans	1,049,616	1,049,616	1,871,627
Vanpool Vehicles	1,126,510	1,067,549	653,706
Underground Storage Tanks Replacement/Renovation	7,000,000	369,653	8,800,000
<b><i>Total</i></b>	<b>19,063,508</b>	<b>3,205,879</b>	<b>32,778,178</b>





**Division  
Detail**

## **FINANCE**

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The Finance Division performs the function of recording and maintaining the Agency's financial transactions and files in conformance with state and federal accounting regulations and generally accepted accounting principles. Provides payroll; accounts payable; accounts receivable; pass and ticket sales; farebox; fixed assets; cash management and general ledger services for the Agency. Develops and maintains internal controls over these functions to safeguard Agency assets. Produces internal and external financial reports. Assists with financial forecasting and modeling coordination. Prepares the Agency's annual budget and monitors revenues and expenditures through the year. Coordinates all internal and external audits.

Agency-wide services and expenses such as liability and property insurance, administration of the agency's deferred compensation plans, and the Cut Commute Committee are included in its budget.

The Finance and Administration Director plans, organizes, and coordinates the activities of the division, and, as part of the senior management staff, assists in the development and implementation of agency policy.

<u>Project Title</u>	<u>Operating Cost</u>	<u>Capital Cost</u>
Salaries/Wages and Benefits	\$ 594,787	
Day-to-Day Activities	66,000	
Training and Development	24,875	
Annual Audit	32,000	
Subscriptions	1,000	
Purchase Passes/Tickets	32,000	
General Agency Insurance	1,250,500	
Pension Committee	5,000	
Cut Commute Committee	35,000	
ESMS Auditor Training	10,000	
<b>Total</b>	<b>\$2,051,162</b>	<b>\$0</b>

## Finance Summary

	2016 Budget	2016 Projected	2017 Budget	2016 Projected vs. 2017 Budget
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	445,041	445,041	453,541	1.91%
Fringe Benefits	130,317	130,317	141,246	8.39%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>575,358</b>	<b>575,358</b>	<b>594,787</b>	<b>3.38%</b>
<b>Services</b>				
Professional Services	18,000	11,288	18,000	59.46%
Accounting/Audit	31,500	22,239	32,000	43.89%
Repair/Maintenance by Others	1,000	500	1,000	100.00%
Printing	30,000	32,116	32,000	-0.36%
<b>Subtotal - Services</b>	<b>80,500</b>	<b>66,143</b>	<b>83,000</b>	<b>25.49%</b>
<b>Supplies</b>				
Operating Supplies	2,000	1,630	2,000	22.70%
Office Supplies	0	366	0	-100.00%
Office Equipment	1,500	1,395	1,500	7.53%
<b>Subtotal - Supplies</b>	<b>3,500</b>	<b>3,391</b>	<b>3,500</b>	<b>3.21%</b>
<b>Insurance</b>				
Unemployment Ins Exp	50,000	26,227	50,000	90.64%
Liability/Property	1,100,000	1,100,000	1,200,000	9.09%
<b>Subtotal - Insurance</b>	<b>1,150,000</b>	<b>1,126,227</b>	<b>1,250,000</b>	<b>10.99%</b>
<b>Taxes</b>				
Property Taxes	2,000	1,774	2,000	12.74%
State Excise Tax	45,000	60,317	45,000	-25.39%
<b>Subtotal - Taxes</b>	<b>47,000</b>	<b>62,091</b>	<b>47,000</b>	<b>-24.30%</b>
<b>Miscellaneous</b>				
Subscriptions	1,000	681	1,000	46.84%
Travel	13,075	6,701	16,825	151.08%
Tuition/Registration	12,300	2,083	19,800	850.55%
Miscellaneous	3,100	2,757	5,000	81.36%
Commute Trip Reduction	29,000	20,789	30,000	44.31%
Guaranteed Ride Home	250	200	250	25.00%
<b>Subtotal - Miscellaneous</b>	<b>58,725</b>	<b>33,211</b>	<b>72,875</b>	<b>119.43%</b>
<b>Division Total</b>	<b>1,915,083</b>	<b>1,866,421</b>	<b>2,051,162</b>	<b>9.90%</b>

## **INFORMATION SYSTEMS**

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Information Systems (IS) staff assist the flow of agency information both internally and externally. To serve its customers, IS provides four main services--a wide area network, a phone system, applications maintenance, and systems analysis services. The wide area network provides a centralized method for storing and sharing information throughout the agency, with IS staff maintaining approximately 110 PCs, 27 network file servers, and other devices. The phone system provides direct inward dial to most office staff and voice mail for all employees, with groups such as Customer Service and Dial-A-Lift scheduling having automatic call distribution lines. Major applications include Fleet-Net (an integrated, transit specific database that serves Accounting, Human Resources, Inventory, Operations, and Vehicle Maintenance); and RouteMatch, Novell, Windows 2003 Servers, and Microsoft Office Suite. Staff also maintains firewalls and filtering software for external connections to prevent hacking and viruses. IS staff provides systems analysis work by reviewing existing information flow and determining and implementing options for its improvement.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$548,737	
Maintenance and Upkeep of Information Systems	586,123	
Training and Development	27,400	
Telephone System	113,590	
Replace Aging Equipment	132,000	\$ 300,000
Replace ACS Orbital/Radio System		5,500,000
Windows/Office Upgrades	120,000	
Replacement for Verint DVR's		250,000
<b>Total</b>	<b>\$1,527,850</b>	<b>\$6,050,000</b>

## Information Systems Summary

	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>	<b>2016 Projected vs. 2017 Budget</b>
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	391,777	391,777	408,432	4.25%
Fringe Benefits	127,861	127,861	140,305	9.73%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>519,638</b>	<b>519,638</b>	<b>548,737</b>	<b>5.60%</b>
<b>Services</b>				
Professional Services	14,250	16,509	13,590	-17.68%
Repair/Maintenance by Others	15,000	7,507	15,450	105.81%
Extra Help	3,100	0	3,100	100.00%
Maintenance Contracts	411,173	306,571	411,173	34.12%
<b>Subtotal - Services</b>	<b>443,523</b>	<b>330,587</b>	<b>443,313</b>	<b>34.10%</b>
<b>Supplies</b>				
Office Supplies	1,100	200	1,100	450.00%
IS Supplies	46,350	45,450	47,750	5.06%
IS Software	272,000	73,901	313,800	324.62%
IS Equipment	0	19,267	0	-100.00%
Cameras	5,000	11,820	5,150	-56.43%
<b>Subtotal - Supplies</b>	<b>324,450</b>	<b>150,638</b>	<b>367,800</b>	<b>144.16%</b>
<b>Utilities</b>				
Phone	79,000	66,874	81,400	21.72%
Communications	20,000	13,280	20,600	55.12%
<b>Subtotal - Utilities</b>	<b>99,000</b>	<b>80,154</b>	<b>102,000</b>	<b>27.26%</b>
<b>Miscellaneous</b>				
Travel	8,100	6,064	8,100	33.58%
Tuition/Registration	19,300	17,333	19,300	11.35%
Rentals	37,500	32,196	38,600	19.89%
<b>Subtotal - Miscellaneous</b>	<b>64,900</b>	<b>55,593</b>	<b>66,000</b>	<b>18.72%</b>
<b>Capital</b>				
IS Equipment	555,500	270,390	6,050,000	2137.51%
<b>Subtotal - Capital</b>	<b>555,500</b>	<b>270,390</b>	<b>6,050,000</b>	<b>2137.51%</b>
<b>Division Total</b>	<b>2,007,011</b>	<b>1,407,000</b>	<b>7,577,850</b>	<b>438.58%</b>

## ***DEVELOPMENT***

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The Development Department is responsible for long range and service planning, marketing, communications, grants, procurement, vehicle and facilities inventory and the management of major agency projects.

Department staff obtain, manage and monitor compliance with state and federal grants; administers the Disadvantaged Business Enterprise Program and Title VI compliance; and coordinates operation of the Amtrak Depot by establishing contracts with Amtrak and local jurisdictions and working with Amtrak volunteers.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$270,609	
Service and Community	500	
Training and Development	19,880	
Pattison Final Design/Future Enhancement		\$ 4,100,000
Olympia Transit Center Expansion		8,492,282
Underground Storage Tanks Replacement/Renovation		8,800,000
Office Rental	47,450	
Traffic Engineering Services	50,000	
New Furniture	25,000	
<b>Total</b>	<b>\$413,439</b>	<b>\$21,392,282</b>



## Development Summary

	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>	<b>2016 Projected vs. 2017 Budget</b>
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	0	0	206,153	100.00%
Fringe Benefits	0	0	64,456	100.00%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>0</b>	<b>0</b>	<b>270,609</b>	<b>100.00%</b>
<b>Services</b>				
Professional Services	0	0	50,000	100.00%
Custodial Services	0	0	4,700	100.00%
<b>Subtotal - Services</b>	<b>0</b>	<b>0</b>	<b>54,700</b>	<b>100.00%</b>
<b>Miscellaneous</b>				
Travel	0	0	16,000	100.00%
Tuition/Registration	0	0	4,380	100.00%
New furniture	0	0	25,000	100.00%
Rentals	0	0	42,750	100.00%
<b>Subtotal - Miscellaneous</b>	<b>0</b>	<b>0</b>	<b>88,130</b>	<b>100.00%</b>
<b>Capital</b>				
Hawks Prairie Park and Ride	2,500	0	0	0.00%
Olympia Transit Center Expansion	8,492,282	6,600	8,492,282	128570.94%
Pattison Final Design/Future Enhance	0	0	4,100,000	100.00%
Environmental Review	5,000	1,640	0	-100.00%
UST Replacement/Renovation	0	0	8,800,000	100.00%
<b>Subtotal - Capital</b>	<b>8,499,782</b>	<b>8,240</b>	<b>21,392,282</b>	<b>259515.07%</b>
<b>Department Total</b>	<b>8,499,782</b>	<b>8,240</b>	<b>21,805,721</b>	<b>264532.54%</b>

**MARKETING & COMMUNICATIONS**

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The Marketing and Communications Division produces agency public information materials and promotes awareness and use of Intercity Transit services. The division oversees the Web site, printed materials, public information pieces, and social media. Marketing and Communications also coordinates marketing, advertising, communications, and outreach programs, supports media relations, and represents the agency to the news media.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$ 526,905	
Produce Agency Information	116,000	
Training and Development	20,439	
Support Agency Services	165,500	
Implement Bicycle Programs	20,000	
Youth Education Program	30,150	
Web Site Enhancement	50,000	
Transportation Alternatives Program Grant	7,000	
Community Conversations	70,000	
<b>Total</b>	<b>\$1,005,994</b>	<b>\$0</b>

## Marketing & Communications Summary

	2016 Budget	2016 Projected	2017 Budget	2016 Projected vs. 2017 Budget
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	407,097	407,097	380,127	-6.62%
Fringe Benefits	141,533	141,449	146,778	3.77%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>548,630</b>	<b>548,546</b>	<b>526,905</b>	<b>-3.95%</b>
<b>Services</b>				
Advertising Services	47,500	5,883	93,000	1480.83%
Professional Services	202,500	69,544	166,750	139.78%
Sponsorships	8,000	3,040	8,000	163.16%
Printing	143,000	73,875	142,000	92.22%
<b>Subtotal - Services</b>	<b>401,000</b>	<b>152,342</b>	<b>409,750</b>	<b>168.97%</b>
<b>Supplies</b>				
Operating Supplies	27,500	12,216	23,000	88.28%
Promotional Items	15,000	3,069	6,000	95.50%
Miscellaneous Equipment	2,000	500	2,000	300.00%
<b>Subtotal - Supplies</b>	<b>44,500</b>	<b>15,785</b>	<b>31,000</b>	<b>96.39%</b>
<b>Miscellaneous</b>				
Travel	13,525	7,174	13,525	88.53%
Tuition/Registration	6,914	3,331	6,914	107.57%
Advertising/Promotion Media	53,500	47,958	0	-100.00%
Miscellaneous	9,500	4,322	8,200	89.73%
Rentals	6,000	8,750	9,700	10.86%
<b>Subtotal - Miscellaneous</b>	<b>89,439</b>	<b>71,535</b>	<b>38,339</b>	<b>-46.41%</b>
<b>Division Total</b>	<b>1,083,569</b>	<b>788,208</b>	<b>1,005,994</b>	<b>27.63%</b>

## ***PLANNING***

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The Planning Division is responsible for developing, monitoring, and evaluating Intercity Transit fixed route services, preparing operator work assignments, and oversight of fare policies. Division staff also provides short and long range planning services, including preparing and coordinating the agency's annual 6-year Strategic Plan.

The division works with local jurisdictions to draft and review comprehensive land use plans, works with both public agencies and private sector developers to ensure that new developments accommodate and meet transit customer needs, including bus stop locates, and participates in regional transportation demand management efforts to help reduce single occupant vehicle trips. Staff also negotiates and administers an annual transit pass program for state, regional and county employees and for students attending three local colleges in the service district.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$ 468,214	
Monitor System Services	5,000	
Training and Development	14,435	
Land Use and Development	10,000	
Park and Pool Project	3,000	
Planning Projects	800	
Short/Long Range Service Plan	170,000	
Transit Signal Priority	705,000	
Bus Stop Enhancements	345,000	\$ 35,000
Route 592 Extension	308,000	
Tumwater Square Transfer Station Improvements		230,000
Fareboxes/Smartcards		1,500,000
<b>Total</b>	<b>\$2,029,449</b>	<b>\$1,765,000</b>

## Planning Summary

	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>	<b>2016 Projected vs. 2017 Budget</b>
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	337,787	337,787	351,215	3.98%
Fringe Benefits	106,861	106,861	116,999	9.49%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>444,648</b>	<b>444,648</b>	<b>468,214</b>	<b>5.30%</b>
<b>Services</b>				
Professional Services	1,183,800	460,363	1,211,300	163.12%
Extra Help	5,000	0	5,000	100.00%
Printing	200	0	200	100.00%
Public Works	10,000	0	10,000	100.00%
Fees and Permits	9,000	8,081	9,000	11.37%
<b>Subtotal - Services</b>	<b>1,438,000</b>	<b>468,444</b>	<b>1,235,500</b>	<b>100.00%</b>
<b>Miscellaneous</b>				
Purchased Transportation	308,000	306,823	308,000	0.38%
Travel	9,350	7,867	9,350	18.85%
Tuition/Registration	5,085	1,100	5,085	362.27%
Rentals	3,300	3	3,300	100.00%
<b>Subtotal - Miscellaneous</b>	<b>325,735</b>	<b>315,793</b>	<b>325,735</b>	<b>3.15%</b>
<b>Capital</b>				
Tumwater Sq Transfer St Improvements	230,000	0	230,000	0.00%
Shelters/Amenities	35,000	0	35,000	100.00%
Fareboxes	0	0	1,500,000	
<b>Subtotal - Capital</b>	<b>35,000</b>	<b>0</b>	<b>1,765,000</b>	<b>100.00%</b>
<b>Division Total</b>	<b>2,243,383</b>	<b>1,228,885</b>	<b>3,794,449</b>	<b>208.77%</b>

**PROCUREMENT**

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The Procurement Division develops and administers construction and other major projects. Manages procurements of goods and services including supervision of vendors, consultants and contractors. Maintains agency-wide calendar for project scheduling. Develops agency-wide procedures for the proper acquisition of goods and services, including development of procurement and contract documents. Leads or assists others in contract administration. Procures and maintains facility and vehicle parts, fuel and operating supplies inventory. Responsible for entry and audits of the agency's inventory, vehicle component, and work order systems within the Fleet-Net database. Inventory staff is also responsible for the administration of the warranty claims systems.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$751,715	
Operating Supplies	6,050	
Training and Development	28,700	
<b>Total</b>	<b>\$786,465</b>	

## Procurement Summary

	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>	<b>2016 Projected vs. 2017 Budget</b>
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	511,305	511,305	552,493	8.06%
Fringe Benefits	177,875	177,875	199,222	12.00%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>689,180</b>	<b>689,180</b>	<b>751,715</b>	<b>9.07%</b>
<b>Services</b>				
Custodial Services	4,700	4,700	0	-100.00%
<b>Subtotal - Services</b>	<b>4,700</b>	<b>4,700</b>	<b>0</b>	<b>-100.00%</b>
<b>Supplies</b>				
Operating Supplies	4,550	1,048	4,550	334.16%
Office Equipment	3,000	2,000	1,000	-50.00%
<b>Subtotal - Supplies</b>	<b>7,550</b>	<b>3,048</b>	<b>5,550</b>	<b>82.09%</b>
<b>Miscellaneous</b>				
Travel	15,245	15,245	16,420	7.71%
Tuition/Registration	10,275	10,275	12,280	19.51%
Miscellaneous	500	0	500	100.00%
Rentals	42,750	42,750	0	-100.00%
<b>Subtotal - Miscellaneous</b>	<b>68,770</b>	<b>68,270</b>	<b>29,200</b>	<b>-57.23%</b>
<b>Division Total</b>	<b>9,269,982</b>	<b>765,198</b>	<b>786,465</b>	<b>2.78%</b>

## **EXECUTIVE**

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The Executive Department is responsible for the overall direction, supervision, and coordination of Agency activities to ensure consistency with policies prescribed by the Transit Authority. Responsible for the coordination of knowledge, effort, and resources between all departments to achieve Agency goals and mission. Responsible for development and administration of agency plans, services, programs, and policies and procedures. Promotes linkage of transit and community development. Ensures and develops communication processes between employees, departments, Authority, and community.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$ 518,622	
Day to Day Activities	10,600	
Training and Development	31,518	
Service & Community	3,350	
Authority Planning Session	8,300	
WSTA/Legislative Events	3,060	
CAC/Authority Support	9,575	
Legal Notices	4,000	
Legal Services	38,000	
Dues	123,500	
Employee/Volunteer Recognition	23,950	
ITA/CAC Training and Development	22,141	
Advocacy Services	118,000	
Transit Appreciation Day	17,000	
Annual Recognition Banquet	12,700	
ISO 14001 Certification	9,000	
Sustainability Committee	6,500	
Grants Consultant	20,000	
<b>Total</b>	<b>\$979,816</b>	<b>\$0</b>



## Executive Summary

	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>	<b>2016 Projected vs. 2017 Budget</b>
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	431,229	431,154	380,236	-11.81%
Fringe Benefits	135,280	135,354	138,461	2.30%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>566,509</b>	<b>566,508</b>	<b>518,697</b>	<b>-8.44%</b>
<b>Services</b>				
Professional Services	148,100	158,474	210,000	32.51%
Printing	1,000	607	1,000	64.74%
<b>Subtotal - Services</b>	<b>149,100</b>	<b>159,081</b>	<b>211,000</b>	<b>32.64%</b>
<b>Supplies</b>				
Operating Supplies	3,850	800	3,750	368.75%
Office Supplies	800	293	800	173.04%
Office Equipment	4,900	1,500	4,900	226.67%
Miscellaneous Equipment	3,000	2,700	3,000	100.00%
<b>Subtotal - Supplies</b>	<b>12,550</b>	<b>5,293</b>	<b>12,450</b>	<b>135.22%</b>
<b>Miscellaneous</b>				
Dues	123,500	121,315	123,500	1.80%
Travel	44,893	30,667	42,393	38.24%
Tuition/Registration	22,240	13,938	22,540	61.72%
Advertising/Promotion Media	8,800	2,501	8,800	251.86%
Miscellaneous	26,236	29,384	36,036	22.64%
Rentals	4,200	3,720	4,400	18.28%
<b>Subtotal - Miscellaneous</b>	<b>229,869</b>	<b>201,525</b>	<b>237,669</b>	<b>17.94%</b>
<b>Department Total</b>	<b>958,028</b>	<b>932,407</b>	<b>979,816</b>	<b>5.08%</b>

**HUMAN RESOURCES**

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The Human Resources Department is tasked to maximize the effectiveness of Intercity Transit’s primary resource, its employees. This is accomplished by hiring and retaining highly effective people who are committed to the services of public transit through professional recruitment procedures, prudent compensation analysis, respectful labor-management relations as well as pro-active labor contract administration. The Intercity Transit Human Resources Department is also responsible for accident and claims administration, safety awareness and oversight and the implementation of a federally required comprehensive drug and alcohol program that includes post-accident and random testing of employees. The Human Resources Department coordinates with the Finance Department in managing payroll and employee benefit programs.

Agency-wide services and expenses such as the receptionist function, office supplies, and centralized office equipment are also administered by the Human Resources Division and are included in its budget.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$ 761,111	
Maintain Human Resources	128,300	
Training and Development	13,060	
Safety/Accident Mitigation	3,000	
Legal Services	65,000	
Employment Medical Programs	16,000	
Drug & Alcohol Program	19,500	
Non-Represented Tuition	2,700	
ATU Tuition	5,000	
IAM Tuition	2,000	
Organizational Development	25,800	
Agency Wellness Activities	10,500	
Recruitment & Selection	41,500	
Non-Rep Compensation Survey	30,000	
<b>Total</b>	<b>\$1,123,471</b>	<b>\$0</b>

## Human Resources Summary

	2016 Budget	2016 Projected	2017 Budget	2016 Projected vs. 2017 Budget
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	556,145	556,145	565,850	1.75%
Fringe Benefits	180,442	180,442	195,261	8.21%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>736,587</b>	<b>736,587</b>	<b>761,111</b>	<b>3.33%</b>
<b>Services</b>				
Professional Services	162,500	142,996	201,000	40.56%
Printing	12,500	12,500	12,500	0.00%
Postage	20,000	20,000	20,000	100.00%
<b>Subtotal - Services</b>	<b>195,000</b>	<b>175,496</b>	<b>233,500</b>	<b>33.05%</b>
<b>Supplies</b>				
Operating Supplies	5,000	3,500	5,000	42.86%
Office Supplies	15,500	15,500	15,500	0.00%
Office Equipment	2,500	2,871	2,000	-30.34%
Miscellaneous Equipment	500	1,492	2,000	34.05%
<b>Subtotal - Supplies</b>	<b>23,500</b>	<b>23,363</b>	<b>24,500</b>	<b>4.87%</b>
<b>Miscellaneous</b>				
Travel	12,075	11,381	11,575	1.70%
Tuition/Registration	26,885	24,810	20,685	-16.63%
Advertising/Promotion Media	10,000	10,000	11,000	10.00%
Miscellaneous	4,900	8,108	7,600	-6.27%
Background/License Checks	10,000	10,000	10,000	0.00%
Rentals	43,000	43,376	43,500	0.29%
<b>Subtotal - Miscellaneous</b>	<b>106,860</b>	<b>107,675</b>	<b>104,360</b>	<b>-3.08%</b>
<b>Department Total</b>	<b>1,061,947</b>	<b>1,043,121</b>	<b>1,123,471</b>	<b>7.70%</b>

**CUSTOMER SERVICE**

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The Customer Service Division, located at the Olympia Transit Center, provides public information about transit services. Other functions include pass and ticket sales, schedule and brochure delivery, administration of the regional reduced fare program, maintenance of lost and found items and field trip planning.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$ 627,821	
Manage Division Activities	16,700	
Training and Development	3,454	
Reduced Fare Program	6,000	
CS Information Books	250	
<b>Total</b>	<b>\$654,225</b>	<b>\$0</b>

## Customer Service Summary

	2016 Budget	2016 Projected	2017 Budget	2016 Projected vs. 2017 Budget
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	435,465	436,888	444,154	1.66%
Fringe Benefits	168,540	168,540	183,667	8.98%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>604,005</b>	<b>605,428</b>	<b>627,821</b>	<b>3.70%</b>
<b>Supplies</b>				
Operating Supplies	1,000	781	1,000	28.04%
Office Supplies	6,500	4,681	6,500	38.86%
IS Software	500	0	500	100.00%
Promotional Items	7,500	3,329	7,500	125.29%
Office Equipment	2,000	1,473	2,000	35.78%
<b>Subtotal - Supplies</b>	<b>17,500</b>	<b>10,264</b>	<b>17,500</b>	<b>70.50%</b>
<b>Miscellaneous</b>				
Travel	1,250	866	1,250	44.34%
Tuition/Registration	2,204	1,159	2,204	90.16%
Miscellaneous	1,250	1,100	1,250	13.64%
Rentals	2,700	1,812	2,700	49.01%
<b>Subtotal - Miscellaneous</b>	<b>7,404</b>	<b>4,937</b>	<b>7,404</b>	<b>49.97%</b>
<b>Division Total</b>	<b>630,409</b>	<b>622,074</b>	<b>654,225</b>	<b>5.17%</b>

**DIAL-A-LIFT SERVICES**

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The Dial-A-Lift Services Division consists of 12 staff members to support the activities of the Dial-A-Lift program. The primary function of the division is to deliver quality specialized transportation service to the riding public within the legal parameters established by the Americans with Disabilities Act (ADA). The division also works closely with other Agencies to develop and implement demonstration projects. The Dial-A-Lift Services Division provides guidance to the agency on the potential ramifications of decisions as they relate to the ADA and acts as a liaison between the local special needs community and the agency through such mediums as public forums.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$ 1,214,980	
Manage Division Activities	9,900	
Training and Development	16,375	
Travel Training Support	2,400	
<b>Total</b>	<b>\$1,243,655</b>	<b>\$0</b>

## Dial-A-Lift Summary

	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>	<b>2016 Projected vs. 2017 Budget</b>
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	817,905	822,310	882,065	7.27%
Fringe Benefits	283,828	283,828	332,915	17.29%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>1,101,733</b>	<b>1,106,138</b>	<b>1,214,980</b>	<b>9.84%</b>
<b>Services</b>				
Professional Services	25,000	25,000	0	-100.00%
<b>Supplies</b>				
Operating Supplies	1,800	364	1,800	394.51%
Office Supplies	300	144	300	108.33%
<b>Subtotal - Supplies</b>	<b>9,800</b>	<b>1,358</b>	<b>9,800</b>	<b>621.65%</b>
<b>Miscellaneous</b>				
Travel	9,900	9,822	13,775	40.25%
Tuition/Registration	2,180	2,180	2,700	23.85%
Miscellaneous	400	250	400	60.00%
<b>Subtotal - Miscellaneous</b>	<b>12,580</b>	<b>12,382</b>	<b>16,975</b>	<b>37.09%</b>
<b>Division Total</b>	<b>1,151,013</b>	<b>1,145,485</b>	<b>1,243,655</b>	<b>8.57%</b>

**FACILITIES MAINTENANCE**

The Facilities Division is responsible for the Agency's buildings, equipment, systems, furnishings and grounds. Included in these responsibilities are installing and maintaining bus stops as well as the maintenance of the Pattison Street facility, the Amtrak Depot, the Olympia Transit Center and the Lacey Transit Center. Facilities is also responsible for hazardous materials management, storm water management, chemical management and recycling management. The responsibility of contract management for custodial services, landscaping services, elevator services and fire protection services also falls within the Facilities Division. The Facilities Division also supports other departments in the management and implementation of their projects.

<u>Project Title</u>	<u>Operating Cost</u>	<u>Capital Cost</u>
Salaries/Wages and Benefits	\$ 765,193	
Service Contracts	226,000	
Training and Development	4,000	
Building/Grounds Maintenance	478,200	
Amtrak Expenses	55,400	
Utilities	327,000	
Pattison Admin HVAC Engineering	20,000	
Repaint Interior Amtrak	10,000	
Bus Stop Enhancements/Solar	150,000	
HVAC Replacement Amtrak	30,000	
Ops Dispatch Repairs/Upgrades		40,000
HVAC Replacement OTC	90,000	
Admin Window Replacement	100,000	
Interior Facility Painting	280,000	
Pattison Carpet Replacement	75,000	
Replace Maintenance Bldg Boiler/Controls/HRUs		400,000
Engineer Concrete Slab Replacement	50,000	
Maintenance Add New Lift and Cover Pit		181,000
Exterior Paint Consultant	25,000	
Amtrak Tree Replacement	20,000	
Replace Tire Machine		25,000
Fall Protection in Maintenance Bays	20,000	55,000
Amtrak Gate/Gate Opener		25,000



***Facilities Maintenance***

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Amtrak Seal Coat/Asphalt Repairs	36,000	
Martin Way P&R Seal Coat	30,000	
Engineer Pattison Replacement Fire/Alarm System	25,000	
Pattison Roof Replacement	412,000	
Pattison Glass Block/Soffit Replacement	400,000	
Pattison Exterior Painting	200,000	
LTC, OTC, Amtrak Exterior Painting	125,000	
Replace Steam Bay Pressure Washer		15,000
Replace One-Man Genie Lift		25,000
Install Motorized Blinds in OTC	10,000	
Install New Tire Carousel		50,000
Upgrade ECO-60 Vehicle Lifts	40,000	
Install Propane Tank Fuel System	10,000	
<b>Total</b>	<b>\$4,013,793</b>	<b>\$816,000</b>

## Facilities Maintenance Summary

	2016 Budget	2016 Projected	2017 Budget	2016 Projected vs. 2017 Budget
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	494,212	499,202	531,434	6.46%
Fringe Benefits	195,885	195,745	219,209	11.99%
Uniforms/Clothing	2,900	2,892	2,900	0.28%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>692,997</b>	<b>697,839</b>	<b>753,543</b>	<b>7.98%</b>
<b>Services</b>				
Professional Services	185,100	26,947	336,100	1147.26%
Repair/Maintenance by Others	404,500	109,402	1,927,500	1661.85%
Extra Help	15,000	10,010	15,000	49.85%
Maintenance Contracts	22,800	12,815	22,800	77.92%
Custodial Services	155,000	134,495	156,000	15.99%
Landscaping Service	74,500	65,152	74,500	14.35%
Fees and Permits	5,500	8,914	7,500	-15.86%
<b>Subtotal - Services</b>	<b>862,400</b>	<b>367,735</b>	<b>2,539,400</b>	<b>590.55%</b>
<b>Supplies</b>				
Fuel/Diesel	1,000	276	1,000	262.32%
Operating Supplies	45,250	45,316	50,250	10.89%
Repair/Maintenance Supplies	29,000	36,376	36,000	-1.03%
R/M Supplies Inventory	225,000	58,479	220,000	276.20%
Sales Tax/Inventory Items	3,000	2,526	3,000	18.76%
Freight	10,000	2,988	10,000	234.67%
Office Supplies	200	200	200	0.00%
Small Tools	5,400	5,400	5,800	7.41%
Miscellaneous Equipment	0	23,770	25,600	7.70%
<b>Subtotal - Supplies</b>	<b>344,450</b>	<b>175,331</b>	<b>351,850</b>	<b>100.68%</b>
<b>Utilities</b>				
Water	63,000	64,372	73,000	13.40%
Recycling/Garbage	25,000	17,098	25,000	46.22%
Natural Gas	76,000	66,824	76,000	13.73%
Electric	168,000	150,146	167,000	11.23%
Phone	2,000	1,983	2,000	0.86%
<b>Subtotal - Utilities</b>	<b>334,000</b>	<b>300,423</b>	<b>343,000</b>	<b>14.17%</b>
<b>Miscellaneous</b>				
Vehicle License/Registration Fees	0	48	0	-100.00%
Travel	2,000	362	2,000	452.49%
Tuition/Registration	2,000	396	2,000	405.05%
Rentals	20,500	21,353	22,000	3.03%
<b>Subtotal - Miscellaneous</b>	<b>24,500</b>	<b>22,159</b>	<b>26,000</b>	<b>17.33%</b>
<b>Capital</b>				
Support Vehicle	50,000	69,445	0	-100.00%
Shop/Garage Equipment	240,000	215,196	115,000	100.00%
Shelters/Amenities	45,000	30,280	0	-100.00%
Facilities	7,140,000	403,062	701,000	73.92%
<b>Subtotal - Capital</b>	<b>7,475,000</b>	<b>717,983</b>	<b>816,000</b>	<b>13.65%</b>
<b>Division Total</b>	<b>9,733,347</b>	<b>2,281,470</b>	<b>4,829,793</b>	<b>111.70%</b>

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## **OPERATIONS**

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The Operations Department is the service delivery arm of Intercity Transit. The Office of the Director provides guidance and administrative support for the Customer Service, Dial A Lift, Facilities, Transportation, Vehicle Maintenance, Vanpool, and Village Vans Divisions. Of the 285 employees in the Department, 206 are represented by Amalgamated Transit Union (ATU) and 37 are represented by the International Association of Machinists Union (IAM). Agency-wide, the Director coordinates service delivery with other Departments, and formulates and implements agency goals consistent with the mission of Intercity Transit. The Office of the Director plays a key role in the administration of the bargaining agreement between ATU, IAM and Intercity Transit and in maintaining a positive working relationship with union leaders and represented employees.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$ 335,704	
Departmental Support	4,600	
Training and Development	6,825	
Communications	59,455	
Vehicle Camera Upgrade (Road View)	120,000	
<b>Total</b>	<b>\$526,584</b>	

## Operations Summary

	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>	<b>2016 Projected vs. 2017 Budget</b>
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	250,772	250,772	250,472	-0.12%
Fringe Benefits	81,654	81,654	85,232	4.38%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>332,426</b>	<b>332,426</b>	<b>335,704</b>	<b>0.99%</b>
<b>Services</b>				
Professional Services	2,000	2,725	2,000	-26.61%
<b>Subtotal - Services</b>	<b>2,000</b>	<b>2,725</b>	<b>2,000</b>	<b>-26.61%</b>
<b>Supplies</b>				
Operating Supplies	1,000	512	1,000	95.31%
Office Supplies	100	50	100	100.00%
Office Equipment	1,000	200	1,000	100.00%
Cameras	120,000	0	120,000	100.00%
Miscellaneous Equipment	500	100	500	400.00%
<b>Subtotal - Supplies</b>	<b>122,600</b>	<b>862</b>	<b>122,600</b>	<b>14122.74%</b>
<b>Miscellaneous</b>				
Travel	4,800	5,108	4,800	-6.03%
Tuition/Registration	2,025	1,875	2,025	8.00%
Rentals	56,753	56,753	59,455	4.76%
<b>Subtotal - Miscellaneous</b>	<b>63,578</b>	<b>63,736</b>	<b>66,280</b>	<b>3.99%</b>
<b>Division Total</b>	<b>520,604</b>	<b>399,749</b>	<b>526,584</b>	<b>31.73%</b>

**TRANSPORTATION**

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The Transportation Division consists of 191 Van and Coach Operators supported by 11 Operations Supervisors and 1 Fixed Route Manager. The primary function of the Division is to effectively meet 100% of Intercity Transit service commitments 365 days a year. Services provided by the division include the operation of all Van and Coach Fixed Route services; and providing Operators for Dial A Lift and special event services. Transportation also provides support services to other departments within the agency in the form of staff training, staff assistance, and assistance with special projects.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$16,580,320	
Department Support	17,400	
Training & Development	18,000	
Administer Security Contract	193,000	
Uniforms for Supervisors/Operators	66,200	
Roadeo	1,500	
<b>Total</b>	<b>\$16,876,420</b>	<b>\$0</b>

## Transportation Summary

	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>	<b>2016 Projected vs. 2017 Budget</b>
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	1,050,674	1,059,042	1,042,339	-1.58%
Fringe Benefits	361,219	361,219	376,549	4.24%
Salaries/Wages (Coach)	8,102,322	8,318,137	8,555,550	2.85%
Premium (Coach)	32,721	32,720	32,721	0.00%
Fringe Benefits (Coach)	3,495,854	3,495,854	3,916,709	12.04%
Salaries/Wages (Van)	1,745,106	1,783,519	1,783,817	0.02%
Premium (Van)	7,279	7,279	7,279	0.00%
Fringe Benefits (Van)	803,160	803,160	865,356	7.74%
Uniforms/Clothing	65,000	64,271	66,200	3.00%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>15,663,335</b>	<b>15,925,201</b>	<b>16,646,520</b>	<b>4.53%</b>
<b>Services</b>				
Professional Services	0	43	0	-100.00%
Security	186,000	189,382	193,000	1.91%
Printing	5,000	4,461	5,000	12.08%
<b>Subtotal - Services</b>	<b>191,000</b>	<b>193,886</b>	<b>198,000</b>	<b>2.12%</b>
<b>Supplies</b>				
Operating Supplies	8,000	7,432	8,500	14.37%
Office Equipment	1,000	700	1,000	42.86%
Miscellaneous Equipment	2,200	743	2,700	263.39%
<b>Subtotal - Supplies</b>	<b>11,200</b>	<b>8,875</b>	<b>12,200</b>	<b>37.46%</b>
<b>Miscellaneous</b>				
Travel	11,950	8,189	13,000	58.75%
Tuition/Registration	4,280	1,660	5,000	201.20%
Miscellaneous	1,200	1,143	1,700	48.73%
<b>Subtotal - Miscellaneous</b>	<b>17,430</b>	<b>10,992</b>	<b>19,700</b>	<b>79.22%</b>
<b>Division Total</b>	<b>15,882,965</b>	<b>16,138,954</b>	<b>16,876,420</b>	<b>4.57%</b>

## **VANPOOL**

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The Vanpool Services Division administers, manages and coordinates Intercity Transit's vanpool program, providing vanpool vehicles for approximately 200 groups of (8 to15) commuters who have at least one end of their commute in Thurston County. The Division provides day-to-day support to vanpool volunteers; recruiting and training volunteer coordinators, drivers and bookkeepers. A regional ridematching service for commuters seeking carpools or vanpools is also administered by this division, as well as the Community Van and Surplus Van Grant programs, providing transportation solutions for nonprofit organizations and community groups.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$ 570,106	
Vanpool Program Administration	20,900	
Training and Development	16,900	
Vanpool Vehicles	2,500	\$653,706
Administer Rideshare Program	3,850	
Incentive Program	25,000	
<b>Total</b>	<b>\$639,256</b>	<b>\$653,706</b>



## Vanpool Summary

	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>	<b>2016 Projected vs. 2017 Budget</b>
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	393,832	393,832	416,160	5.67%
Fringe Benefits	139,067	139,067	153,946	10.70%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>532,899</b>	<b>532,899</b>	<b>570,106</b>	<b>6.98%</b>
<b>Services</b>				
Professional Services	8,500	2,300	3,500	52.17%
<b>Subtotal - Services</b>	<b>9,750</b>	<b>2,800</b>	<b>4,750</b>	<b>69.64%</b>
<b>Supplies</b>				
Operating Supplies	100	166	100	-39.76%
Office Supplies	500	226	500	121.24%
Office Equipment	1,400	555	1,400	152.25%
<b>Subtotal - Supplies</b>	<b>2,000</b>	<b>947</b>	<b>2,000</b>	<b>111.19%</b>
<b>Miscellaneous</b>				
Travel	8,300	6,649	8,300	24.83%
Tuition/Registration	8,600	6,650	8,600	29.32%
Vanpool Driver Record Checks	6,500	4,004	6,500	62.34%
Guaranteed Ride Home	500	416	500	20.19%
Vanpool Incentive Program	14,000	19,523	23,500	20.37%
<b>Subtotal - Miscellaneous</b>	<b>54,900</b>	<b>53,991</b>	<b>62,400</b>	<b>15.57%</b>
<b>Capital</b>				
Vanpool Vehicles	1,126,510	1,067,549	653,706	-38.77%
<b>Subtotal - Capital</b>	<b>1,126,510</b>	<b>1,067,549</b>	<b>653,706</b>	<b>-38.77%</b>
<b>Division Total</b>	<b>1,726,059</b>	<b>1,658,186</b>	<b>1,292,962</b>	<b>-22.03%</b>

**VEHICLE MAINTENANCE**

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The Vehicle Maintenance division is responsible for providing a daily complement of coaches, vans, vanpool vans, and staff vehicles. Maintenance is involved in the procurement of replacement and expansion vehicles and parts, supplies, tools and equipment. The Division provides a safe work environment, and helps ensure an ecologically sound environment through recycling programs and vehicle improvements. Staff constantly monitors and evaluates products and methods to achieve a high level of productivity and efficiency. The Division constantly strives to enhance vehicles to provide a clean, safe, reliable and efficient environment for internal and external customers.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$3,864,064	
Vehicle Fleet Support	290,485	
Training and Development	51,200	
Village Vans	24,734	
Dial-A-Lift Vans	695,876	
Coaches	5,385,666	
Staff Vehicles	66,899	
Vanpool Vans	899,983	
Contract Benefits	42,374	
Purchase Staff Electric Car		\$ 46,680
Internal Staff Development	10,600	
Purchase Staff Station Wagon		27,583
Purchase Five Dial-A-Lift Expansion Vans	464	780,000
Purchase A/C Recovery/Recycle		20,600
Purchase Seven Dial-A-Lift Vans	669	1,091,627
Purchase Facilities Truck		60,000
Purchase Operations Vehicle		40,200
Purchase Staff Car		34,500
<b>Total</b>	<b>11,333,014</b>	<b>\$2,101,190</b>

## Vehicle Maintenance Summary

	2016 Budget	2016 Projected	2017 Budget	2016 Projected vs. 2017 Budget
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	2,602,020	2,632,495	2,743,574	4.22%
Fringe Benefits	1,015,234	1,015,234	1,110,490	9.38%
Uniforms/Clothing	22,660	25,008	24,278	-2.92%
Tool/Boot Allowance	18,540	18,648	19,096	2.40%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>3,658,454</b>	<b>3,691,385</b>	<b>3,897,438</b>	<b>5.58%</b>
<b>Services</b>				
Professional Services	0	22,648	2,546	-88.76%
Repair/Maintenance by Others	162,740	175,963	169,743	-3.53%
Extra Help	10,000	10,000	10,000	0.00%
Printing	927	1,999	1,594	-20.26%
<b>Subtotal - Services</b>	<b>173,667</b>	<b>210,610</b>	<b>183,883</b>	<b>-12.69%</b>
<b>Supplies</b>				
Fuel/Diesel	2,691,984	1,217,712	2,499,651	105.27%
Fuel/Gasoline	808,598	418,947	741,079	76.89%
Fuel/Propane	0	0	50,000	100.00%
Oils/Lubes	65,199	89,409	85,350	-4.54%
Tires/Tubes	116,435	117,204	172,267	46.98%
Operating Supplies	111,070	120,826	114,402	-5.32%
R/M Supplies Inventory	1,522,134	1,595,636	3,367,799	111.06%
Sales Tax/Inventory Items	92,700	106,141	113,215	6.66%
Freight	21,630	22,670	22,279	-1.72%
Small Tools	20,600	22,524	21,218	-5.80%
Office Equipment	0	250	500	100.00%
Miscellaneous Equipment	0	242	500	106.61%
<b>Subtotal - Supplies</b>	<b>5,450,350</b>	<b>3,711,561</b>	<b>7,188,260</b>	<b>93.67%</b>
<b>Miscellaneous</b>				
Vehicle License/Registration Fees	464	464	1,133	100.00%
Travel	20,000	22,978	25,600	11.41%
Tuition/Registration	30,300	31,209	36,200	15.99%
Miscellaneous	0	7,200	500	-100.00%
Rentals	0	0	0	-100.00%
<b>Subtotal - Miscellaneous</b>	<b>50,764</b>	<b>61,851</b>	<b>63,433</b>	<b>2.56%</b>
<b>Capital</b>				
Shop/Garage Equipment	20,000	20,000	20,600	100.00%
Staff Vehicles	72,100	72,100	208,963	100.00%
Revenue Vehicles	1,049,616	1,049,616	1,871,627	100.00%
<b>Subtotal - Capital</b>	<b>1,141,716</b>	<b>1,141,716</b>	<b>2,101,190</b>	<b>100.00%</b>
<b>Division Total</b>	<b>10,474,951</b>	<b>8,817,123</b>	<b>13,434,204</b>	<b>52.36%</b>

**VILLAGE VANS**

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Village Vans includes on-going development and operation of the on-demand advanced reservation service for eligible individuals. This project is funded from a Federal Department of Transportation, Job Access / Reverse Commute grant.

The Village Van program provides transportation for welfare participants and other low-income individuals. The service transports eligible passengers to work-related activities including job search, training and educational classes and other necessary appointments. It is designed to help passengers who cannot access regular fixed bus routes to fulfill responsibilities that are difficult or especially time consuming. The program operates with regular collaboration between Intercity Transit, government agencies and social service organizations that work with low-income individuals.

<b>Project Title</b>	<b>Operating Cost</b>	<b>Capital Cost</b>
Salaries/Wages and Benefits	\$190,846	
Day to Day Activities	2,400	
Training and Development	3,000	
<b>Total</b>	<b>\$196,246</b>	<b>\$0</b>

## Village Vans Summary

	<b>2016 Budget</b>	<b>2016 Projected</b>	<b>2017 Budget</b>	<b>2016 Projected vs. 2017 Budget</b>
<b>Salaries, Wages and Benefits</b>				
Salaries/Wages	132,064	132,141	139,406	5.50%
Fringe Benefits	46,796	46,865	51,640	10.19%
<b>Subtotal - Salaries/Wages/Benefits</b>	<b>178,860</b>	<b>179,006</b>	<b>191,046</b>	<b>6.73%</b>
<b>Supplies</b>				
Operating Supplies	600	488	400	-18.03%
<b>Miscellaneous</b>				
Tuition/Registration	2,000	1,105	1,500	35.75%
Advertising/Promotion Media	0	45	500	1011.11%
Miscellaneous	600	543	600	10.50%
Village Van Driver Record Check	700	837	700	-16.37%
<b>Subtotal - Miscellaneous</b>	<b>3,300</b>	<b>5,613</b>	<b>4,800</b>	<b>-14.48%</b>
<b>Division Total</b>	<b>182,960</b>	<b>185,107</b>	<b>196,246</b>	<b>6.02%</b>



# **Appendix A**

## Staffing Comparisons Between the 2016 Budget and 2017 Budget

	2016 Budgeted Staff - Full-Time Equivalents	Additions to Staffing During 2016	New Positions for 2017	2017 Budgeted Staff - Full- Time Equivalents	Difference
<b>Finance and Administration Department</b>					
<b>Finance Division</b>					
Accounting Assistant	1			1	0
Accounting Specialists	2			2	0
Finance Manager	1			1	0
Finance & Administration Director	1			1	0
<b>Subtotal - Finance Division</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>0</b>
<b>Information Services Division</b>					
Information Systems Technician	1			1	0
Information Systems Analysts	3			3	0
Information Systems Manager	1			1	0
<b>Subtotal - Information Services Division</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>0</b>
<b>Total Finance and Administration Department</b>	<b>10</b>	<b>0</b>	<b>0</b>	<b>10</b>	<b>0</b>
<b>Development Department</b>					
<b>Development Division</b>					
Development Director	1			1	0
Grants Program Administrator	1			1	0
<b>Subtotal - Development Division</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>0</b>



## Staffing Comparisons Between the 2016 Budget and 2017 Budget

	2016 Budgeted Staff - Full-Time Equivalents	Additions to Staffing During 2016	New Positions for 2017	2017 Budgeted Staff - Full- Time Equivalents	Difference
<b>Marketing Division</b>					
Bicycle Commuter Contest Coordinator	0.5			0.5	0
Youth Education Assistant	1			1	0
Youth Education Specialist	1			1	0
Marketing and Communications Representative	1			1	0
Marketing & Communications Coordinator	1			1	0
Mktg & Comm & Outreach Manager	1			1	0
<b>Subtotal - Marketing Division</b>	<b>5.5</b>	<b>0</b>	<b>0</b>	<b>5.5</b>	<b>0</b>
<b>Planning Division</b>					
Service Planner	1			1	0
Planner 2	1			1	0
Scheduler	1			1	0
Planning Manager	1			1	0
<b>Subtotal - Planning Division</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>4</b>	<b>0</b>
<b>Procurement Division</b>					
Inventory Assistant	1			1	0
Inventory Specialist	1			1	0
Inventory Supervisor	1			1	0
Project Coordinator	3			3	0
Procurement Manager	1			1	0
<b>Subtotal - Procurement Division</b>	<b>7</b>	<b>0</b>	<b>0</b>	<b>7</b>	<b>0</b>
<b>Total Development Department</b>	<b>22.5</b>	<b>0</b>	<b>0</b>	<b>22.5</b>	<b>0</b>

## Staffing Comparisons Between the 2016 Budget and 2017 Budget

	2016 Budgeted Staff - Full-Time Equivalents	Additions to Staffing During 2016	New Positions for 2017	2017 Budgeted Staff - Full- Time Equivalents	Difference
<b>Executive Department</b>					
<b>Executive Division</b>					
Executive Assistant 2	2			2	0
Environmental & Sustainability Coordinator	1			1	0
General Manager	1			1	0
<b>Total Executive Department</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>4</b>	<b>0</b>

### Human Resources Department

Human Resources Department	1			1	0
Human Resources Administrative Assistant	1			1	0
Human Resources Assistant	1			1	0
Human Resources Specialist	1			1	0
Human Resources Analyst	1			1	0
Training Coordinator	1			1	0
Human Resources Senior Analyst	1			1	0
Human Resources Director	1			1	0

### Total Human Resources Department

	<b>7</b>	<b>0</b>	<b>0</b>	<b>7</b>	<b>0</b>
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### Operations Department

Customer Services Division	6			6	0
Customer Service Representative	1			1	0
Lead Customer Service Representative	1			1	0
Customer Service Supervisor	1			1	0
<b>Subtotal - Customer Services Division</b>	<b>8</b>	<b>0</b>	<b>0</b>	<b>8</b>	<b>0</b>

## Staffing Comparisons Between the 2016 Budget and 2017 Budget

	2016 Budgeted Staff - Full-Time Equivalents	Additions to Staffing During 2016	New Positions for 2017	2017 Budgeted Staff - Full- Time Equivalents	Difference
<b>Dial-A-Lift Division</b>					
Dial-a-Lift Dispatch Specialist	8		1	9	1
Dial-A-Lift ADA Coordinator	1			1	0
Dial-A-Lift Travel Training Coordinator	2			2	0
Dial-A-Lift Manager	1			1	0
<b>Subtotal - Dial-A-Lift Division</b>	<b>12</b>	<b>0</b>	<b>1</b>	<b>13</b>	<b>1</b>
<b>Facilities Division</b>					
Facilities Specialists	5			5	0
Facilities Technicians	2			2	0
Facilities Manager	1			1	0
<b>Subtotal - Facilities Division</b>	<b>8</b>	<b>0</b>	<b>0</b>	<b>8</b>	<b>0</b>
<b>Operations Division</b>					
Operations Assistant	1			1	0
Scheduling Coordinator	1			1	0
Operations Director	1			1	0
<b>Subtotal - Operations</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>3</b>	<b>0</b>
<b>Transportation Division</b>					
Van Operators	37		1	38	1
Coach Operators	153			153	0
Transportation Supervisor	11			11	0
Transportation Manager	1			1	0
<b>Subtotal - Transportation Division</b>	<b>202</b>	<b>0</b>	<b>1</b>	<b>203</b>	<b>1</b>

## Staffing Comparisons Between the 2016 Budget and 2017 Budget

	2016 Budgeted Staff - Full-Time Equivalents	Additions to Staffing During 2016	New Positions for 2017	2017 Budgeted Staff - Full- Time Equivalents	Difference
<b>Vanpool Division</b>					
Commuter Services Assistant	1			1	0
Vanpool Coordinator	4			4	0
Vanpool Supervisor	1			1	0
<b>Subtotal - Vanpool Division</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>6</b>	<b>0</b>
<b>Vehicle Maintenance Division</b>					
Vehicle Cleaner	6			6	0
Service Worker	5		1	6	1
Support Specialist	3			3	0
Auto Technician	7			7	0
Diesel Technician	15			15	0
Maintenance Supervisor	4			4	0
Maintenance Manager	1			1	0
<b>Subtotal - Vehicle Maintenance Division</b>	<b>41</b>	<b>0</b>	<b>1</b>	<b>42</b>	<b>1</b>
<b>Village Vans Division</b>					
Village Vans Assistant	1			1	0
Village Vans Supervisor	1			1	0
<b>Subtotal - Village Vans Division</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>0</b>
<b>Total Operations Department</b>	<b>282</b>	<b>0</b>	<b>3</b>	<b>285</b>	<b>3</b>
<b>Agency Totals</b>	<b>321.5</b>	<b>0</b>	<b>3</b>	<b>324.5</b>	<b>3</b>





# INTERCITY TRANSIT

## DRAFT STRATEGIC PLAN

2017 - 2022

Intercity Transit Authority:

Jeff Gadman, Chair - City of Lacey  
Ryan Warner, Vice Chair - Citizen Representative  
Bud Blake - Thurston County Commissioner  
Ed Bricker - Labor Representative  
Molly Carmody - City of Yelm  
Clark Gilman - City of Olympia  
Don Melnick - Citizen Representative  
Karen Messmer - Citizen Representative  
Debbie Sullivan - City of Tumwater

Intercity Transit General Manager:

Ann Freeman-Manzanares

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## **Chapter 1: Background and Purpose**

### **INTRODUCTION**

The purpose of this Strategic Plan is to define levels and types of public transportation services to be offered to the citizens of Thurston County over the next six years and to determine the amount and sources of the revenue to finance the services. The 2017-2022 Strategic Plan will establish the financial parameters and policy positions for the 2017 Budget. The plan also outlines a capital program, service levels, and specific services for the six-year period. These are meant to be examples of services and projects that will be refined through a more detailed planning process that includes numerous opportunities for public input.

The 2017-2022 Strategic Plan assumes Intercity Transit will stay at the current sales tax level of 0.8%. The maximum allowable sales tax for public transportation is 0.9%. A 0.1% increase in sales tax is a tax of one cent on a ten dollar purchase and generates approximately \$4 million per year in revenue.

While the economy and sales tax revenue is recovering, it is still important to note the loss of approximately \$14 million dollars in sales tax revenue between 2008 and 2014. Sales tax revenues in 2009 were 10% below 2008 levels and 13% below 2007 levels. Both 2010 and 2011 sales tax revenues were essentially equal to the 2009 level. Sales tax recovered moderately in 2012 with sales tax revenues approximately 1% above the level of the previous year. We saw sales tax growth in 2013, 2014 and 2015 with approximately 3.8%, 4.1% and 9% respectively above the level of the previous year. While the economy is improving, this still represents a significant loss of revenue over this period of time. It is difficult to forecast future sales tax revenue which makes long term planning a challenge as this represents approximately 70% of our budget. Along with the potential volatility of sales tax, fuel pricing, the four year elimination of federal funding for bus and bus facilities and the return of funding as of December 2015 but at a significantly reduced rate makes maintaining current service levels a challenge.

The first Strategic Plan adopted by the Intercity Transit Authority was the 2002-2007 Strategic Plan adopted in late 2001. The goal of the 2002-2007 Strategic Plan was to define and implement a set of routes and services that would be implemented by 2006, which could be maintained with the proposed level of sales tax and other revenues. The 2002-2007 Strategic Plan required several bold initiatives including reducing the boundaries of the Public Transportation Benefit Area (PTBA) and doubling the level of sales tax devoted to public transportation. The boundaries were reduced in early 2002 to an area approximating the boundaries of the cities of Lacey, Olympia, Tumwater, and Yelm and their Urban Growth Areas. In September 2002, voters within the new PTBA approved an increase in the sales tax from .3% to .6%. This allowed

the adoption of the service plan that expanded service over a 3- year period.

Growth in sales tax revenue and lower than expected expenses in the 2003 to 2006 time period combined to allow an additional service expansion in 2008. An expansion of approximately 12% was implemented in February 2008. This was in addition to the service expansion identified in the 2002-2007 Strategic Plan. The major capital projects outlined in the plan were also completed.

In 2002, the need for additional funding was driven by the loss of Motor Vehicle Excise Tax (MVET) funding. The increase in sales tax essentially replaced this funding and allowed for a restoration of services. In 2009, the Authority again faced a significant reduction in sales tax revenue due to the steep economic downturn. Fares were increased 33% in January 2009, and the Authority requested voters consider a 0.2% increase in the sales tax in August 2010. This increase was approved by 64% of voters and allowed Intercity Transit to implement a modest service increase in February 2010 and to continue major capital projects.

With the passage of the Federal FAST Act, there is more certainty regarding federal support but the levels of funding remain below the previous funded levels. And there continues to be uncertainty about the level of state funding that will be dedicated to public transportation. Intercity Transit receives a relatively small amount of state funding. This is used for approximately 6% of the Dial-A-Lift budget. Intercity Transit has received state funding for replacement vanpool vehicles as well as funding for two express routes connecting Tumwater to Lakewood and Olympia to DuPont with continuing service to Seattle through June 2017.

A major challenge facing Intercity Transit is the increasing demand for both local and express service and not having the funding to support it. A critical challenge is finding the funding to rehabilitate and address capacity concerns at the Operations/Maintenance/Administrative base facility so we can continue to provide service as well as address the growing needs of our community. The community has expressed the need to provide fixed route and Dial-A-Lift services within our current boundaries to areas currently unserved. In addition, the community has requested that we start service earlier, end later and increase frequency. The demand for express service connecting Thurston, Pierce and King Counties continues to grow. The elimination of all Pierce Transit express service in the highly congested I-5 corridor resulted in Intercity Transit adding a number of additional trips in 2011. This additional service significantly impacted Intercity Transit budget. It was hoped that Pierce Transit would resume service but to date there is no indication that they will do so.

The final design and engineering for the rehabilitation and expansion of the Pattison Street maintenance and operations facility had been delayed due to the elimination of bus and bus facility funding under the 2012 federal transportation legislation. One of the unfortunate

results of the elimination of funding is the need to individually pursue needed rehabilitation work with local dollars. Five million dollars in local funds are identified in the budget to replace old underground storage tanks (UST) which do not meet current environmental standards. In addition to the five million dollars in local funds, Intercity Transit was awarded close to three million dollars in grant funds to pursue this UST project. Once the UST project is underway, staff will again focus on the Olympia Transit Center design, environmental work and project delivery method. The construction is hoped to be completed in 2018. Grant funding has been secured for this project.

Intercity Transit will continue its focus on sustainability and environmental management in 2017 and beyond. Intercity Transit completed its training to implement an ISO 14001 Environmental and Sustainability Management System receiving ISO certification in 2014. We Achieve ISO 14001 certification in 2015 and 2016 and are focused on enhancing our program to meet the 2015 ISO Audit standards in November 2016. Intercity Transit has committed to a yearly audit process and certification through 2019. Intercity Transit received national Gold level recognition in the American Public Transportation Association's Sustainability Commitment program and will continue to meet or exceed those standards. We continue to focus on aligning best practices, agency activities and technologies towards a more sustainable future.

## **PLAN ORGANIZATION**

The plan is structured as follows:

- **Chapter 1** describes Intercity Transit's Strategic Plan efforts beginning in 2001 and continuing with the development of this plan covering the period 2017 through 2022.
- **Chapter 2** defines Intercity Transit's role in our community, and the Mission and Vision Statements. Key principles defining the levels and types of service needed by the community are also presented.
- **Chapter 3** identifies policy issues facing Intercity Transit today and over the next six years. Specific actions are stated for each issue. These actions include actions to take place in 2017 and actions for the 2018 to 2022 time period.
- **Chapter 4** describes the public transportation services recommended for Thurston County. While some of the specifics may change, this chapter provides a general description of the types and levels of service recommended for Thurston County over the next six years. Customer and community surveys took place the later part of 2015, with analysis of the results released in 2016. These, along with our planned "Community Conversation" will provide a basis to update Intercity Transit's short and long-range service plan. This update will take place in 2017 and will likely result in revision of this recommendation.
- **Chapter 5** describes the capital expenditures required to implement and maintain the proposed service plan and to continue to expand and modernize our capital equipment and facilities.
- **Chapter 6** presents the financial plan and the level of revenue necessary to implement the proposed plan.

- **Chapter 7** is a recap of Action Plans.

## **BACKGROUND**

In January, 2000, the funds Intercity Transit received from the Motor Vehicle Excise Tax (MVET) were eliminated. Intercity Transit received approximately \$8 million per year or 42% of its revenues from this source prior to 2000. Intercity Transit acted quickly to respond to this loss of revenue. In March 2000, Intercity Transit reduced the amount of service by over 40% and reduced its workforce by the same level. In May 2000, the Washington State Legislature provided a one-time allocation of funding to help transit systems adjust to the loss of MVET funds. Intercity Transit used this funding, approximately \$2.8 million, to reinstate Sunday service and some other services. The net reduction in service after this restoration was 35%.

The level of service restored in May 2000 required expenditures above the revenue provided by the local sales tax and other sources. The Intercity Transit Authority elected to operate a level of service that could be maintained for three years by drawing from reserve funds. This three-year period would be used to determine if the Legislature would restore some level of funding and to work with the community to determine the appropriate levels of service and funding for Intercity Transit.

Intercity Transit worked with the Thurston Regional Planning Council, the Transportation Policy Board, the Intercity Transit Citizen Advisory Committee, and the Intercity Transit Authority to develop a Strategic Plan for Public Transportation service in Thurston County. This Strategic Plan was adopted in early 2002. It addressed the role Intercity Transit should play in the community, and the levels and types of services that should be provided. The service improvement and capital programs included in this plan were implemented in three phases with the third phase completed in February 2006.

The Authority updated the Strategic Plan in 2006 and included additional service improvements in February 2008. This was possible due to the significant increases in sales tax revenue and ridership between 2003 and 2008. The need for an additional service change was anticipated in 2010 or 2011; however, it was recognized this would be dependent on the state of the local economy and growth in sales tax revenue. 2008 saw sharp increases in fuel prices to over \$4.00 per gallon. This increased ridership by over 18% in 2008 while also sharply increasing the cost of fuel in terms of our expenditures. The Authority reacted to this cost increase by increasing fares 33% on January 1, 2009. The economy saw a significant downturn in 2009 with sales tax revenue dropping over 12% in a single year.

The reduction in sales tax revenue resulted in Intercity Transit facing a 22% reduction in service without an increase in revenue. The Authority considered a sales tax increase as part of the 2009 - 2014 Strategic Plan but delayed the election until a later date. The issue was considered again as part of the 2010-2015 Strategic Plan, and the Authority elected to place a 0.2% sales tax increase on the August 2010 ballot. The measure was approved by the voters with

a 64% positive vote. This allowed current service to be maintained and a 3% service increase in February 2011. Additional service changes occurred in 2011 to address the elimination of express service to Thurston County by Pierce Transit, to eliminate unproductive Dash service and to revise several routes to address on-time performance issues. The net result of these additional service changes was a very small increase in revenue hours.

In July 2012, MAP-21, the federal transportation authorization bill, provided formula allocated funding for Intercity Transit but eliminated discretionary funding for major capital projects and revenue vehicles. Previous Strategic Plans assumed the Pattison Street Maintenance and Operations facility expansion and renovation and new buses would be primarily funded at 80% with federal discretionary funding. That was totally disruptive to our historical funding model requiring we dedicate significantly more local dollars to capital expenses. In December 2015, the federal FAST Act restored a portion of the bus and bus facilities dollars but at a far reduced level.

## **Chapter 2: Intercity Transit Mission and Vision**

### **MISSION STATEMENT**

The completion of the implementation of the 2002 Strategic Plan led the Intercity Transit Authority to review the agency's mission and vision statements, originally adopted in 1996.

The Authority discussed the key ideas that should be included in the mission statement, and in August 2006, adopted a draft statement for review by employees and the Citizen Advisory Committee. Following their review and comments, the Authority adopted a final statement in September 2006, with revisions in May 2010.

*"Our mission is to provide and promote transportation choices that support an accessible, sustainable, livable, healthy, prosperous community."*

### **VISION STATEMENT**

"Vision" and "Mission" are often confused and sometimes used interchangeably. However, there are important differences. The Mission Statement outlines why an organization exists. The Vision Statement reflects what organizational success looks like. It serves as our guide to action. It is consistent with the organization's values. It challenges and inspires us to achieve our mission.

The Authority, in tandem with the revision of the mission statement, drafted a new Vision Statement, and sought review from the Citizen Advisory Committee and employees.

Following this review, the following Vision Statement for Intercity Transit was adopted.

*“Our vision is to be a leading transit system in the country, recognized for our well trained, highly motivated, customer-focused, community-minded employees committed to enhancing the quality of life for all citizens of Thurston County.”*

## **GOALS AND END POLICIES**

The Intercity Transit Authority adopts a new set of goals each year. These goals continue to be clarified and the list expanded upon. These goals are listed below:

**Goal 1** - Assess the transportation needs of our community throughout the Public Transportation Benefit Area.

*End Policy - Intercity Transit Authority, staff, and the public will have access to clear and comprehensive information related to the transportation needs of our Public Transportation Benefit Area.*

**Goal 2** - Provide outstanding customer service.

*End Policy - Customers and the community will report a high level of satisfaction.*

**Goal 3** - Maintain a safe and secure operating system.

*End Policy - Focus on the continual improvement for the safety and security of all customers, employees and facilities.*

**Goal 4** - Provide responsive transportation options within financial limitations.

*End Policy - Customers and staff will have access to programs and services that benefit and promote community sustainability.*

**Goal 5** - Integrate sustainability into all agency decisions and operations to lower environmental impact and enhance our community.

*End Policy - Resources will be used efficiently with minimal impact on the environment.*

**Goal 6** - Encourage use of services.

*End Policy - Educate and encourage community members to explore and appreciate the benefits of public transportation.*

## **INTERCITY TRANSIT'S ROLE IN THURSTON COUNTY**

The 2002 Strategic Plan included the following summary of the role that Intercity Transit should play in Thurston County. This statement remains valid today and for the six-year period of this Strategic Plan.

Intercity Transit is the leader, major advocate and prime source of information for public transportation in Thurston County. In this capacity, we are charged to balance several important functions:

- Providing primary transportation for people without an alternative, including those with a physical or mental disability;
- Offering high-quality alternative transportation for people with options;
- Providing a stimulant to economic growth;
- Serving as a partner in building livable communities; and,
- Being a ready resource able to respond to community emergencies.

We do this by providing effective and efficient services maximizing the public benefit from invested resources. This is done by:

- Regularly evaluating the performance of all services and balancing life-line services with the allocation of resources to those that generate the greatest number of riders per unit of invested resources;
- Pursuing new investments in community resources including capital facilities and intelligent transportation systems that will allow better use of transportation resources;
- Supporting efforts by local jurisdictions that encourage transit supportive development; and,
- Striving to expand services in order to keep pace with the community's growth and to address unmet transportation needs in the community.

## **INTERCITY TRANSIT'S FOCUS ON PERFORMANCE**

Major housing and commercial developments are occurring on the edges of our service area and "infill" development is also slowly occurring. This places increasing demands upon Intercity Transit. Residents of developing neighborhoods and commercial areas request new bus routes. Those in established neighborhoods want existing services to operate more frequently, earlier in the morning and later at night. Regional commuters increasingly look to Intercity Transit as a way to avoid having to drive on the region's crowded freeways. Ridership, on the other hand, initially slowed in 2009, grew again in 2011 as local and national economies continued to decline and set a new annual record in 2012. Since then, with a 25% increase in fares in 2013, lower fuel costs and lower enrollment at local colleges, ridership has declined. By the end of 2015 fixed route ridership dropped 4.18%.

Even with additional revenues, demands for service will likely outstrip our ability to provide them, forcing difficult choices. Intercity Transit focuses on productivity, measured by the passengers per revenue hour on a route, as the best way of determining service effectiveness and for allocating available resources. This focus on performance forms the basis for numerous established policies and is continued by this plan. However, there is recognition by the Authority that this focus on productivity must be balanced with the issue of coverage and life-line services.

There are some areas of the PTBA that are difficult to serve, and routes serving these areas may never reach the productivity level of other Intercity Transit services. The Authority must continually determine if certain portions of the PTBA will receive service regardless of productivity of the route serving the area.

## **DESIGN PRINCIPLES FOR THE NEXT SIX YEARS**

In developing recommendations for the Thurston County Public Transportation Benefit Area (PTBA), we identified seven general design principles. These principles guide development of a public transportation system appropriate for our PTBA today and over the next six years. These principles provided guidance to the development of a Short and Long-Range Service Plan completed in early 2006, and for the updated service plan presented to the Authority in 2008 and updated in 2010. They will be revisited in the update of the Short and Long-Range Service Plan to be completed in 2017.

### **Design Principle #1**

*Operate a range of services, each designed to meet the needs and capabilities of the neighborhoods it serves.*

Intercity Transit traditionally employed a route classification scheme that matches service levels to the characteristics of the neighborhoods being served. In the past, local fixed-route services were divided into five general groups – trunk, primary, secondary, rural, and circulator routes. Circulator routes are those routes designed to serve major activity centers or downtown areas such as the “Dash,” which serves downtown Olympia and the Capitol Campus.

### **Design Principle #2**

*Strengthen service operating along major corridors.*

Over two-thirds of Intercity Transit’s fixed-route patronage is recorded on the system’s seven trunk routes. This fact reflects the high concentrations of housing, employment and commercial activity along the corridors they serve. Our goal is to provide more frequent service, later night service and expanded weekend service along the key corridors. This is



designed to make transit easy and convenient to use, and competitive with automobile usage when traveling in the major corridors.

### **Design Principle #3**

#### ***Reduce customer travel times.***

It is very difficult for public transportation to compete with auto travel times. Whether they ride local fixed-route service or use vanpools or express buses, patrons must typically go to a centralized pickup point, wait for a prearranged departure time, and are then further delayed whenever other patrons get on or off. This all affects the competitiveness of public transportation.

Strategies to reduce travel time include:

- Express services;
- Priority treatments for transit vehicles;
- More direct services linking major points of origin and destination; and,
- Fare policies that speed boarding times.

Each is a valid strategy for reducing public transportation's travel time disadvantage. The potential of each of these strategies is discussed in Chapter 3.

### **Design Principle #4**

#### ***Keep pace with development***

New development is taking place outside Intercity Transit's core of urban services. Developments in the Northeast Lacey, Hawks Prairie, South Tumwater, Briggs Nursery, and Kaiser Road areas hold special challenges for Intercity Transit, because bus travel times tend to be long and service levels are low. If Intercity Transit does not effectively serve these major developments, we will reduce the number of residents who can realistically use public transportation. Intercity Transit should continue to support quality infill projects, and the strengthening of existing downtown and employment areas that take advantage of existing public transportation services. At the same time, system plans should provide for new services that reach out to major new developments outside our traditional service area. To date, lack of equipment and operating funds have limited our ability to provide service.

### **Design Principle #5**

#### ***Expand regional express routes.***

Thurston County is becoming more closely linked to the Central Puget Sound region. Citizens increasingly suggest commuter rail service be established between Tacoma and Thurston County, or Thurston County join the Central Puget Sound Regional Transit Authority (Sound Transit). While both projects are outside the six-year timeframe of this plan, Intercity Transit still

recognizes the increasing need to improve inter-county travel opportunities. For now, that need is most appropriately addressed through expanded express bus, vanpool and ridesharing services. The completion of the Lakewood Center Park-and-Ride facility, the expansion of the Martin Way Park-and-Ride lot and the opening of the Hawks Prairie facility significantly increased available parking for these services. Two express services to Lakewood and DuPont, with continuing service to Seattle, are funded through a State Regional Mobility Grant Program which expires June 30, 2017.

### **Design Principle #6**

*Support a range of transportation alternatives.*

Because fixed-route transit services consume the largest part of Intercity Transit's budget, they receive the most attention in agency plans. At the same time, they represent only one part of Intercity Transit's overall product mix. Greater opportunities to use alternative transportation helps Intercity Transit provide better public transportation services by offering more means for customers to reach its routes and facilities. Increased use of transportation alternatives also serves two of the major purposes of public transportation, reducing traffic congestion and air pollution. Three initiatives are proposed to continue:

- Intercity Transit will continue to support and expand its active vanpool and ridesharing programs. Together, these services already support significant reductions in travel by single-occupant vehicles at a modest public cost per passenger trip.
- Intercity Transit will continue to promote bicycling, walking, ridesharing and telecommuting as alternatives to driving alone. All of these modes complement public transportation use and can help Intercity Transit pursue its mission.
- We should support public and private sector initiatives that encourage alternate mode usage. Intercity Transit should continue to review and comment on community plans and proposed developments, highlighting ways both can better support alternative transportation modes. We should also support ongoing Commute Trip Reduction and Transportation Demand Management efforts being pursued by the state and local jurisdictions. Additionally, Intercity Transit should demonstrate its commitment to these efforts by advocating the importance of commute trip reduction to our own employees.

### **Design Principle #7**

*Provide fixed facilities and equipment that support the region's public transit infrastructure.*

Effective public transportation demands an investment in capital facilities that promotes customer comfort, speeds travel and increases safety. To succeed, express services need adequate park-and-ride capacity, equipment and technology that allow integration with regional transit systems. And local services need ADA compliant stops, shelters and customer information. The entire system needs reliable, safe and efficient equipment. The capital improvements that are identified in Chapter 5 attempt to fulfill these needs.

## **Chapter 3: Intercity Transit Policy Positions**

The Intercity Transit staff worked with the Intercity Transit Authority and the Citizen Advisory Committee to develop a list of policy issues that will face Intercity Transit during the following six years. These issues fall into five general categories:

- Fixed Route Service and Service Design
- Capital Investments
- Financial
- Other Intercity Transit Services
- General Policy Issues

The issues and list of actions for 2016 and 2017-2021 are presented below. These are updated from the 2016-2021 Strategic Plan. The discussion of fixed-route service levels and service design is presented in greater detail in Chapter 4.

### **1. Should Intercity Transit maintain service levels in 2016 or consider new or expanded local transit services needed to serve the growing population?**

While new or expanded local services are needed to serve our current population, our financial outlook necessitates a conservative approach. State funding will expire for two grant-funded Express routes Tumwater to Lakewood and Olympia to DuPont with continuing service to Seattle June 30, 2017. If more funding were to become available, staff recommends the following priority be given to future service increases:

- Address running time and on-time performance issues.
- Address service gaps on current routes. This would include adding a later evening or earlier morning trip or adding Saturday and/or Sunday service to a route.
- Enhance service on existing routes by increasing frequency or with minor route extensions or changes.
- Add service where grant funds or partnerships provide a significant portion of the cost.
- Add new service to areas not currently served by Intercity Transit within the PTBA.

#### **Actions - 2017**

- Intercity Transit should examine and monitor all routes in regards to productivity and issues of coverage.

#### **Actions - 2018-2022**

- Complete the update of the short and long-range service plan with the assistance of a third-party expert in the field. This will provide a fresh look at our route and schedule structure, support service resource prioritization and be developed with the valuable input of employees, customers and community members.

- Intercity Transit should implement the recommendations of the updated service plan.
- Intercity Transit should continue to seek funding to rehabilitate and expand the maintenance and operating facility.

## **2. What is Intercity Transit’s role in providing regional mobility?**

The demand for additional Intercity Transit service between Olympia and Tacoma/Pierce County increased when Pierce Transit eliminated their Olympia Express service. The award of two WSDOT Regional Mobility Grants support two additional Express routes Tumwater to Lakewood and Olympia to DuPont with continuing service to Seattle expires June 30, 2017. In addition, Intercity Transit supports three local park and rides: Martin Way Park-and-Ride (I-5 at Martin Way), Hawks Prairie Park-and-Ride (I-5 and Hogum Bay) and Amtrak Centennial Station (Yelm Hwy.).

The continued growth of Joint Base Lewis McChord (JBLM) and the importance of I-5 to regional travel and the economy of the region, make the need for effective public transportation service between Thurston County and the central Puget Sound more than just an Intercity Transit issue. The State of Washington should play a significant role in the provision of public transportation in this corridor and Pierce Transit should resume sharing service again.

### **Actions - 2017**

- Continue to engage with the TRPC and WSDOT to consider alternatives for serving Joint Base Lewis-McChord (JBLM) and the I-5 corridor.
- Approach state and federal funding sources to provide assistance in meeting the public transportation demand in the I-5 corridor. This should include funding assistance to maintain and improve current service as a first step of a long-range plan as well as support of the vanpool program.
- Advocate for HOV lanes and other transit prioritization mechanisms.
- Support the continued growth of the vanpool program.
- Continue to implement and evaluate additional service provided through the Regional Mobility Grant program.

### **Actions - 2018-2022**

- Intercity Transit should continue to promote vanpooling and ridesharing to meet regional mobility needs.
- Continue to pursue joint use agreements as necessary to secure park and ride space to support ridesharing, express bus and local transit services
- Continue to work with the State of Washington and others to develop a long range plan for public transportation in the corridor.

### **3. What role should Intercity Transit play in serving the core areas of Olympia, Lacey, and Tumwater areas?**

#### **Actions - 2017**

- Request state funding to operate the DASH service.
  - Work with the State to identify and promote adequate parking for Dash service.
- Continue the provision of park and ride spaces during the Legislative session at the Farmer's Market.
- Work with area stakeholders to market and cross promote transit in core areas of Olympia, Lacey and Tumwater.
- Work with the State, local jurisdictions and major employers regarding parking and Commute Trip Reduction plans.

#### **Actions - 2017-2021**

- Intercity Transit should continue to operate the Dash service, and seek funding to expand the service to other concentrations of State employees or facilities.
- Intercity Transit should continue to increase service and ridership in major corridors and maintain the number of corridors with 15-minute service. If more funding becomes available, increase the service frequency.

### **4. Is there a role for local express service in the current service area?**

Intercity Transit currently operates no local express service. Local express service generally operates in major corridors with service speed being increased by reducing the number of stops and/or by introducing transit priority measures in the corridor.

Our market research shows travel time is one of the primary barriers to increased ridership for many of our customers or potential customers. Local express service is one way to increase service speed. The tradeoff is there is a greater distance between stops resulting in greater walking distances for passengers. If the service speed is increased by skipping certain stops, adequate information must be provided to customers to avoid confusion when their stop is skipped.

The two new inter-county routes implemented September 30, 2013 - Tumwater to Lakewood and Olympia to DuPont with continuing service to Seattle - provide some ability to track use of local intra-county express service with stops scheduled at the Capitol Campus and Hawks Prairie Park and Ride.

#### **Actions - 2017**

- The Martin Way and Capitol Way corridors appear to be the most feasible corridors for this type of service. There is also potential for enhanced service efficiency along congested thoroughfares that provide significant connections to urban corridors and transit facilities.

The CMAQ funded study to explore developing “smart” corridors is complete and nearing implementation. Intercity Transit should continue to participate in this effort and advocate stop and traffic signal system improvements in these corridors.

- Monitor intra-county ridership related to the Tumwater-to-Lakewood and Olympia to DuPont service.

#### **2018 - 2022**

- Additional equipment is not anticipated to be available to explore local express service. Monitor the results of the “smart” corridors project to help evaluate potential future success.
- The Tumwater-to-Lakewood and Olympia-to-DuPont Regional Mobility grant funds expire June 30, 2017.

#### **5. Should transit priority measures – signal priority, queue bypasses, bus lanes – be considered?**

##### **Actions - 2017**

- Implementation of the pilot signal preemption project in the Martin Way and Capital corridors.

##### **Actions - 2018-2022**

- Intercity Transit should work with the Thurston Regional Planning Council, the City of Olympia, the City of Lacey, the City of Tumwater, and Thurston County to explore improvements to the Martin Way corridor to improve pedestrian access to transit stops and increase transit vehicle speeds and reliability.
- Intercity Transit should work with the Thurston Regional Planning Council, the City of Olympia, the City of Lacey, and Thurston County to develop the Martin Way corridor as a “smart corridor.”
- Intercity Transit should work with the Thurston Regional Planning Council, the City of Olympia, the City of Lacey, and Thurston County to expand the number of intersections and buses equipped to enable signal preemption.
- Partner with jurisdictions to enhance the safety and speed of bus movement.

#### **6. Should Intercity Transit pursue efforts to coordinate service with local school districts?**

The issue of coordination between local school districts and the public transportation provider is one often raised. Both school districts and transit systems have large fleets of buses and the school district vehicles are generally used only during peak periods. In addition, the vehicles often operate on the same roadways and appear to offer duplicative service. In some communities, students primarily use the public transportation system for travel to and from school. There are several barriers that make coordination between the services difficult. These include:

- The peak periods of both the public transportation system and the public school system generally coincide. There is little excess capacity in either system in the peak periods.
- School buses and public transportation vehicles are very different in design and requirements. Public transportation vehicles must be fully accessible, provide more space per passenger, provide more passenger amenities and be able to operate up to 16 hours per day. School buses are lighter duty vehicles designed to operate four to six hours per day and on residential streets. They are designed to maximize capacity rather than comfort.
- School bus routes tend to be circuitous routes focused on a particular school. School buses often operate on neighborhood streets. Public transit routes tend to be more direct and operate on major and minor arterials. Public transit service generally expects passengers to walk longer distances than school bus routes.
- School buses are able to stop traffic, so students may safely cross a street. Transit vehicles do not have this ability. Students are trained to cross in front of a school bus. This is not the case for transit passengers.
- There is a reluctance to place younger students on public transportation where there is limited ability to monitor their interaction with other customers. Efforts to coordinate service are generally limited to middle and high school students. Intercity Transit staff and regional school districts' staff should work together to determine if there are coordination opportunities.

#### **Actions - 2017**

- Intercity Transit should continue its Youth Education program.
- Intercity Transit should continue to work with schools and youth to teach skills for safe biking, walking and transit use.

#### **Actions - 2018-2022**

- Intercity Transit staff should continue to market public transportation and the use of transportation alternatives to students.
- Intercity Transit should work with school districts to encourage the location of schools in areas served by public transportation and to develop safe paths for walking, biking, and access between transit routes and school facilities.
- Focus on coordinated emergency management response.

#### **7. What level of passenger infrastructure (bus shelter, benches, lighted stops, passenger information) is appropriate?**

In 2005, the Intercity Transit Authority adopted a policy of providing a shelter at every bus stop. Currently, Intercity Transit has 945 bus stops and shelters at 288 of those stops. Intercity Transit previously received a Surface Transportation Program (STP) grant of approximately \$350,000 to purchase additional shelters and make additional stop improvements. This began in 2009 and was completed in 2011.

A STP Enhancement grant of \$240,000 was obtained in 2011 to implement accessibility improvements at 46 stops. This project was completed in early 2013. Intercity Transit received an STP grant in 2013 in the amount of \$160,000 to improve 20 bus stops and again in 2014 to complete another 20 stops. In 2015, 27 bus stops were improved and we have improved an additional 43 in 2016. In addition, we're working cooperatively with the City of Tumwater to make improvements to Tumwater Square. We anticipate those enhancements will be complete in 2017. We have submitted a grant application for TAP funding through TRPC to upgrade 63 bus stops to ADA accessibility standards in 2017-2018.

#### **Actions - 2017**

- Implement grant, in cooperation with the City of Tumwater, to enhance the Tumwater Square.
- Pursue engineering 2017-2018 grant funded bus stop enhancement project.

#### **Actions - 2018-2022**

- Continue to pursue available program funds to upgrade bus stops and shelters.
- Purchase seating and other amenities for stops without shelters which have the most passenger activity.
- Continue a program of bus stop improvements with priority on making all stops ADA-accessible.
- Prioritize bus stop improvements by the level of passenger activity. An emphasis should be given to stops located near facilities serving elderly persons or others with special transportation needs, as well as to stops located on major corridors.

#### **8. What additional investments in technology should be made beyond the current Advanced Communications System project?**

The Advanced Communications System is aging and experiencing glitches which the manufacturer is having difficulty addressing. Anticipated replacement is several years out. The system will be closely monitored. Staff replaced the telephone system in 2016. A short-term strategy to address server room capacity was addressed in 2014 by leasing space from WSDOT as opposed to building a server room. An improved website will be released in 2017.

#### **Actions - 2017**

- Work to complete website upgrades.
- Continue to work with the CAD-AVL system manufacturer to correct glitches.

#### **Actions - 2018-2022**

- Study replacement and implement new Advanced Communications System.
- Continue improvements to the Web site.



- Update review of the Information Systems function.
- Develop a plan to address longer term server room issues and to provide adequate space for computer and other communications equipment.

### **9. Should the vanpool program continue to expand to keep pace with demand?**

The Authority increased vanpool fares approximately 18% in January 2009, to match Pierce Transit's vanpool fare. Vanpool staffing also increased in 2009 with the hiring of a Commuter Services Assistant to allow continued growth of the program. The Intercity Transit vanpool program grew to 220 active vanpools by the end of 2012 and we increased staffing for 2013 by an additional Vanpool Coordinator. With a 10% fare increase in January 2013, the program for the first time began to lose riders and vanpool groups. With continued slow jobs growth and low fuel pricing, the program has continued to lose groups ending 2015 with 192 groups. As the economy and job creation improves, the population grows, fuel prices rise, and we experience increased congestion as the demand to travel to and from Thurston County increases, we anticipate the program will grow. Vanpool supports economic development in that it is a cost effective and efficient way to get employees to work sites. It is a service that supports residents and businesses located in both urban as well as the more rural parts of the county.

Many of the vehicles to replace and expand the program have been funded through a Washington State Department of Transportation (WSDOT) grant and local dollars. Beginning in 2012, Intercity Transit began receiving federal funding allocated to the Puget Sound Regional Council based on service provided to Pierce County and King County. In this last funding cycle these Federal 5307 funds covered approximately 67% of the replacement cost of all vehicles which travel into or out of the Seattle UZA.

#### **Actions - 2017-2022**

- Continue to pursue WSDOT Vanpool Improvement Program grants to fund replacement vehicle purchases.
- Utilize federal 5307 funds through the Puget Sound Regional Council for travel into the Seattle UZA.
- Focus on building the program to previous numbers of active groups and thereafter plan on adding an average of 10 new groups each year over the six years of this plan.
  - Reserve vehicles slated for surplus if demand exceeds our ability to serve.
  - Purchase expansion vehicles when necessary.

### **10. Are there capital purchases or other projects that are needed to allow future growth? What is the appropriate timeline for these projects?**

Historically Intercity Transit has obtained 80% federal funds for the purchase of all buses and for capital improvement projects. With the four-year elimination of federal bus and bus

discretionary funding under MAP-21, and the continued reduction in federal funding opportunities will continue to prove a significant challenge to simply replace our current fleet and provide the existing levels of service let alone purchase additional vehicles to allow for growth.

Intercity Transit has been successful in obtaining federal funding for all other major capital projects with the exception of the renovation and expansion of the Pattison Street Operating and Maintenance facility. The unfortunate result is the need to individually pursue needed rehabilitation work incrementally, which is more expensive, and the need to pursue them with local dollars, which could have been dedicated to other purposes. As an example, the Authority dedicated five million dollars to replace old underground storage tanks (UST) which do not meet current environmental standards and were in danger of losing insurance coverage.

Another challenge is should Intercity Transit dedicate additional local funds to complete the final design for the Pattison Street Facility, potentially placing us in a more competitive position should funding become available. Based on the former funding climate, the Authority decided not to dedicate additional local dollars. With the passage of the FAST Act, there is renewed focus on finalizing the design and obtaining the funds to complete the ultimate goal of full renovation and expansion and the ability to leverage local dollars with state and federal grant funds.

#### **Actions - 2018**

- Complete the Pattison Street Facility UST project.
  - Dedicate funds to complete the final design for the Pattison Street Facility Rehabilitation and Expansion project.
- Continue to seek funding opportunities to complete construction of the Pattison Street Facility.
- Develop a long-term capital funding plan.

#### **Actions - 2018-2022**

- Continue to pursue funding to finance the Pattison Street project, new buses and other projects.

### **11. Should Intercity Transit pursue additional park and ride facilities?**

Although we feel that additional park-and-ride locations are needed, staff urges caution in dedicating capital funds for additional park-and-ride facilities at this time.

WSDOT Regional Mobility Grant funds were obtained to expand the Martin Way Park-and-Ride by 170 parking spaces and build the 325-space Hawks Prairie Park-and-Ride facility in 2012. There is still room at these facilities to support express bus, vanpool, and ridesharing

programs. In addition, the State of Washington is supporting the use of 30 parking spaces at a facility in Tumwater in support of the new Tumwater to Lakewood express service.

**Actions - 2017**

- Pursue joint use agreements to secure park and ride space to serve ridesharing, express bus and local transit services.

**Actions - 2018-2022**

- Continue to pursue joint use agreements as necessary to secure park-and-ride space to support ridesharing, express bus and local transit services.
- Continue to monitor and work with local jurisdictions and the Washington State Department of Transportation regarding potential locations for a park-and-ride facility.

**12. How do Village Vans, Community Vans, the Surplus Van Grant and Discounted Bus Pass programs fit into Intercity Transit’s future plans? Are there other programs of this type that should be considered?**

These four programs should be continued in future years. All of these programs are very successful and allow us to assist many community partners. These programs are relatively low cost for Intercity Transit with grant and program revenues covering some of the cost. The grant funds previously utilized for Village Vans had been eliminated under MAP-21. Intercity Transit was successful in obtaining a two year federal WorkForce Development grant.

**Actions - 2017**

- Offer 50% discounted bus passes to organizations and agencies serving low income clients up to \$300,000.
- Continue to seek replacement grant funding for the Village Van Program.

**Actions - 2018-2022**

- Continue support for the Village Van, Surplus Van Grant, Community Van and Discounted Bus Pass programs.
- Advocate and monitor potential funding for continuation of the Village Vans program.

**13. Are our services - Dial-A-Lift, Travel Training, and Accessible Fixed-Route Buses adequate to serve persons with disabilities?**

Intercity Transit continues to improve its service to persons with disabilities focusing on travel training, bus buddies and improved bus stop locations. Market Research of Dial-A-Lift services to measure customer satisfaction and the need for service improvements was completed in 2015, with results released in early 2016, showing a very high level of satisfaction with the Dial-A-Lift service. Staff recommends Market Research of Dial-A-Lift services be conducted every 3 to 5 years.

Eighteen vehicles in the Dial-A-Lift fleet were replaced in 2011. Ten vehicles were replaced in 2013. Replacement of the eight fixed-route vans and ten standard floor coaches in 2008 greatly increased the accessibility of the fixed-route vehicle fleet for all users. Advanced Communication System features such as automated stop announcements, transfer protection, and improved customer information also improved customer service for all fixed-route passengers.

Though Intercity Transit fixed-route buses are accessible, many individuals are still unaware of just how easy it is to use fixed-route. By expanding the Travel Training program and enhancing it with Bus Buddies, Intercity Transit increases its focus on educating persons with disabilities and senior citizens on the accessibility of the fixed route, increasing personal independence and reducing costly Dial-A-Lift trips.

**Actions - 2017**

- Receive five expansion and seven replacement vehicles in 2017.
- Continue to focus on expanding the Travel Training program and the Bus Buddies program.

**Actions - 2018-2022**

- Continue to pursue improvements in scheduling software and use of technology to improve productivity and service.
- Replace most unreliable vehicles.
- Continue the effort to make all bus stops accessible and to provide shelters and other amenities at stops serving persons with disabilities.
- Apply the principles of Universal Design to all capital purchases and projects, and explicitly consider accessibility and usability for the widest range of individuals when evaluating equipment and technology.

**14. Is the current fare policy appropriate?**

Staff recommends we retain our policy to review fares every three years. The fare structure, effective February 2013, is as follows:

Category	Per Ride	Daily	Monthly
Adult	\$1.25	\$2.50	\$36
Youth (6-17)	\$1.25	\$2.50	\$15
Reduced	\$.50	\$1.00	\$15
Dial-A-Lift	\$1.25	\$2.50	\$36 or \$15

The Authority has agreed it is prudent at this time to continue with our current fare structure.

## **15. Should Intercity Transit’s planning for the next six years be financially constrained?**

The majority of Intercity Transit’s funding is from the local sales and use tax. This was increased from 0.6% to 0.8% in August 2010. This allowed Intercity Transit to maintain current service levels and make modest service improvements. The Authority has an additional 0.1% sales tax authority that could be levied at a future date. The financial forecast included in this plan is based on the current 0.8% sales tax. In 2017, Intercity Transit will focus on an extensive community engagement and conversation to help define what public transit should look like in our community.

## **16. What role should Intercity Transit play in local transportation projects-Commute Trip Reduction, Youth Education Programs and the Bicycle Commute Contest?**

Intercity Transit was the lead agency for the Thurston County Commute Trip Reduction prior to 2001. The loss of MVET funds in 2000 made it difficult to maintain this role. In 2001, the local jurisdictions contracted with a private firm to coordinate the program. Intercity Transit remained an active partner and provided Employee Transportation Coordinator training and outreach to major worksites as part of its marketing programs. In 2005, the Thurston Regional Planning Council became coordinator of the CTR program, and Intercity Transit was contracted to provide marketing, training, and support service. In 2006, Intercity Transit received a Trip Reduction Performance Program (TRPP) grant to provide expanded CTR services in the Tumwater Town Center area. This program was completed in mid-2007. Intercity Transit received an additional TRPP grant for 2008 and 2009 to implement a marketing program aimed at commuters traveling from outside Thurston County to the Capitol Campus and the Olympia downtown area. This program, “Capitol Commutes” was completed in June 2009. TRPC received grants to expand CTR activities in Thurston County and contracted with Intercity Transit to assist with these efforts.

Intercity Transit established several successful community and youth outreach programs over the past several years. Two of these – the Bicycle Commuter Contest and Smart Moves youth education program – were assumed by Intercity Transit in 2005 when the program and funding were in danger. Since then, Intercity Transit developed these into strong, ongoing programs with significant community support. Key to this success is a full-time Youth Education coordinator and a Bicycle Commuter Contest coordinator who works six months of each year. The 2017 budget will include one part-time, grant-funded position and several grant-funded “intern” positions to assist in implementing youth education activities.

### **Actions 2017**

- Focus on providing education and outreach to our senior population.
- Continue to support grant-funded positions to assist in implementing youth education activities in 2017.
- Continue to support cycling safety and bike maintenance in 2017 and find additional

sources for bike donations.

- Continue to pursue grant opportunities to supplement the Youth Education program and the Bicycle Commuter Contest.
- Focus on providing options and opportunities to our senior population.

#### **Actions - 2018-2022**

- Work with the Thurston Regional Planning Council, the State of Washington and the affected local jurisdictions to improve the Commute Trip Reduction Program.
- Pursue relationships with private employers to educate about the benefits of commute alternatives and better serve their needs and the needs of their employees.
- Continue to market alternative transportation to youth and in schools, as well as in the larger community.
- Intercity Transit should continue to coordinate the Bicycle Community Contest and seek grant funding to expand its efforts.
- Intercity Transit should aggressively market high frequency corridor service.

#### **17. Should Intercity Transit's current marketing approach and level of effort be continued?**

Intercity Transit's marketing and communications program include marketing, broad community outreach, ongoing corporate communications, branding, public involvement and media relations.

Intercity Transit completed a significant market research effort in late 2015 and early 2016 that indicated we had significant success attracting new riders, retaining riders for longer periods of time, and raising awareness of transit services. The research confirmed our key markets continue to be commuters and young people. Customer satisfaction and market segmentation survey work is critical to our success and should be done every 3 to 5 years.

#### **Actions - 2017**

- Focus on community outreach and engagement.
- Intercity Transit should continue to aggressively market its services, and should at a minimum, maintain the current level of marketing and community outreach efforts.
- Intercity Transit should expand its web site to better serve our various constituents and to continue to be a relevant business and communications tool for the agency.
- Intercity Transit should continue to pursue outreach communications through social media platforms.

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#### **Actions - 2018-2022**

- Intercity Transit should aggressively market the high level of service offered in major corridors.
- Intercity Transit should continue its marketing and communications efforts to educate the

community about existing and new services and the value of public transportation to the community Intercity Transit serves.

- Intercity Transit should continue to make use of customer information technology to enhance the customer experience and support service value. A real-time bus arrival service, such as OneBusAway, should be an ongoing program available to Intercity Transit bus riders.

## **18. What steps should Intercity Transit take to reduce emissions and the negative environmental impacts of our operations?**

Intercity Transit took a number of steps to reduce emissions from its vehicle fleet. Intercity Transit was one of the first transit agencies in the country to use biodiesel in its entire fleet.

One of the most important steps Intercity Transit took was to remove older engines from service and to retrofit older engines with emission reduction equipment. This was largely accomplished in 2007, with the purchase of 18 new, replacement vehicles. Intercity Transit also received a grant from the Department of Ecology to install diesel oxidation catalysts and crankcase ventilation filters on the 12 oldest Intercity Transit coaches that would still be in the fleet after 2007. The purchase of six hybrid buses in 2010, seven more in 2012 and ten more in 2014 significantly reduces emissions through 26%-percent better fuel economy.

Intercity Transit's policy is to use "environmentally friendly" chemicals and materials in its entire operations. Intercity Transit developed and adopted a formal Environmental and Sustainability policy in 2011. This policy focuses on actions we take to protect the current environment, primarily through compliance with environmental regulations and practices, and use of materials that do not adversely impact the natural environment. The policy also includes a sustainability element designed to enable us to meet the needs of current residents and of future growth without compromising a future that includes a healthy environment, economy, and society.

A Sustainability Plan was presented to the Authority in October 2009. This plan includes an inventory of current emissions and recommendations to improve our practices and processes. Intercity Transit completed the training in the Federal Transit Administration's Environmental Management System program and has continued to develop and enhance our system. ISO 14001 certification of Intercity Transit's Environmental and Sustainability Management System (ESMS) program started in 2013. We earned certification starting in 2014 and have committed to a yearly audit process through 2019.

Intercity Transit should continue to take an active role in local land use planning to encourage transit-oriented development and to ensure new development supports increased use of public transportation. Intercity Transit should continue to support the Thurston Regional Planning Council's efforts including the Sustainable Thurston County project, the Smart Corridors

project, Thurston Here to There, and other projects. The Authority and staff should be involved in local jurisdiction comprehensive plan updates.

#### **Actions - 2017**

- Increase involvement in local and regional land use planning efforts and advocate for transit-oriented development and other development that encourages the use of transportation alternatives.
- Maintain ISO 14001 certification for the Environmental and Sustainability Management System program.
- Seek funding partnership with Puget Sound Energy to reduce energy and water usage and waste production.
- Continue to utilize environmentally friendly chemicals and materials in all operations, and require their use to the maximum extent possible by vendors and contractors.
- Update the Sustainability Plan and continue implementation of recommendations.
- Continue partnerships with the Thurston Green Business group and Puget Sound Energy's Green Power program.

#### **Actions - 2018-2022**

- Continue implementation of the Sustainability Plan and update as needed.
- New buildings and facilities should meet current green building standards.
- Continue to evaluate alternatively fueled vehicles and more sustainable products and equipment

### **19. What should be Intercity Transit's policy and actions related to expansion of the PTBA?**

#### **Actions - 2017-2022**

- Maintain the current policy which is not to expand the PTBA.

The focus is to enhance service in areas that support increase frequency and span of service and to serve areas currently not served within the existing PTBA. Funding does not lend itself to providing service beyond the existing boundaries. The Intercity Transit Authority should consider annexation of new areas only if representatives of these areas request the Authority take steps to hold an annexation election and demonstrate that there is support for the action in the area to be annexed.

### **20. Should Intercity Transit seek alternative funding sources involving stakeholders in an extended dialogue to determine if a mutually acceptable strategy can be derived?**

#### **Actions - 2017-2022**

The Intercity Transit Authority should bring together community stakeholders (schools,



private business, non-profits, state and local governments) in having a greater role in providing alternative funding for transit services rather than relying on federal funding.

Thurston Regional Planning Council supported a grant application to educate and facilitate a broader community conversation to explore the gap in regional expectations and funding availability.

## **Chapter 4: Recommended Service Plan**

### **SERVICE RECOMMENDATIONS**

This Strategic Plan includes no significant changes in service. As the economy improves or if additional revenue becomes available, service may be added. The Short and Long Range Service Plan will be updated in 2017 and should identify priorities for future service increases and expansions if financially feasible and alternatively identify how service might be reduced if that becomes necessary.

Any service change should be based on the service principles identified in the Strategic Plan. These will be reviewed as part of the Service Plan update in 2017. The current service principles are reviewed below:

#### **1. Operate five different types of local service, each designed to meet the needs of the neighborhoods it serves.**

Intercity Transit will operate five types of local service, based on the road network, residential densities, and levels of commercial activity in the areas being served. These types of service are summarized in the following table.

<b>TYPE</b>	<b>ROADWAY</b>	<b>PEAK PERIOD</b>	<b>MIDDAY SERVICE</b>	<b>NIGHT SERVICE</b>
Trunk	Major Arterial	15	15	30
Primary	Local	30	30	60
Secondary	Arterial, Local	30/60	60	None
Rural	Local	30/60	60	None

Trunk route service levels may be obtained by multiple routes operating in the same corridor. For example, routes 41 and 48 provide a 15-minute all-day service between the Olympia Transit Center and Harrison and Division and between the Olympia Transit Center and The Evergreen State College.

Circulator routes operate in a Central Business District or other major activity center. The Dash

began service in the Capitol Campus/Downtown Olympia area in early 2006. The Dash service operates approximately every 15 minutes when the Legislature is not in session and every 12 minutes during the Legislative session.

## **2. Strengthen service operating along major corridors.**

Services operating along major corridors will be strengthened by operating weekday services more frequently and by extending hours of operation. A significant level of resources was allocated in the previous Strategic Plan to accomplish this. Corridors with service operating every 15 minutes were established throughout the service area. Existing corridors with service every 15 minutes include:

- The Martin Way corridor from 7:00 a.m. to 7:00 p.m. from the Hawks Prairie area via the Lacey Transit center to the Olympia Transit Center (OTC).
- Capitol Way from the Olympia Transit Center to Tumwater Boulevard and the Tumwater Town Center area.
- OTC to The Evergreen State College via Division and Cooper Point Rd. Harrison from the OTC to Division receives 15-minute service.
- OTC to the Westfield Mall.
- OTC to South Puget Sound Community College.

Route 41 operating between TESC and the Olympia Transit Center began operating service every 15 minutes during peak periods in early 2011. All day 15-minute service should be added on this route when funds become available.

Major corridors also received new shelters and other stop upgrades in the past several years. This will continue in 2014 and beyond.

## **3. Reduce customer travel times.**

Intercity Transit completed a major market research project in early 2005 and updated this work in 2009. This research found a major impediment to increased use of public transportation was the travel time difference between traveling by bus and by automobile. This issue will be addressed by providing more direct service, increasing travel speeds through the use of transit priority measures, and by increasing service reliability.

## **4. Keep pace with new high-density development.**

Numerous developments located just outside Intercity Transit's current service network are planned or under construction. These will have a significant impact on Intercity Transit's service. Major developments include:

- **North Marvin Rd./Meridian Campus.** This area includes commercial/ office development and significant residential development. In late 2007, this area became the home to a new Cabela’s outdoor store, a significant traffic generator expected to attract additional development to the area. Future development in this area could create the need for a new transit center and extensive service. Development slowed with the economic downturn, and the scale of future development is in question. The Hawks Prairie park-and-ride facility opened in 2012 and could serve as the transit center for this area.
- **Tumwater Town Center.** This includes the area bordered by I-5, Tumwater Boulevard, Israel Rd., and Capital Blvd. The number of state employees in this area continues to increase and plans call for increased residential and retail development. Fifteen minute service was introduced to this area in early 2008. Express service Tumwater to Lakewood began September 30, 2013. This service is funded in large part by a two-year regional Mobility Grant which will expire June 30, 2015.
- **Briggs Urban Village/Boulevard Rd. development.** The Briggs Urban Village and several other subdivision developments in southeast Olympia provide opportunities for increased service and ridership in an area that has not shown strong transit usage in the past. This development slowed with the economic downturn, but the area is now developing with additional housing and planned retail.
- **Yelm Development.** New retail development, continuing residential growth, and new roadway construction combine to require additional public transportation service to the Yelm area.

## 5. Expand regional express routes.

Intercity Transit expanded and upgraded the Olympia-Tacoma Express services over the past five years. The following improvements were implemented:

- An early morning service was added to connect with the Sounder train. As additional trains are added, and as funding allows, schedules will be adjusted to meet those trips.
- Weekday and Saturday services operate later in the evening, allowing evening travel from Seattle, SeaTac and University of Washington - Tacoma to Thurston County.
- Sunday express service began operation. Midday frequency increased and the route was simplified.

The elimination of Pierce Transit service in 2011 created new challenges for this service. Intercity Transit added several trips to fill major service gaps but continues to be faced with demand that exceeds capacity. The Olympia express service will undergo an extensive review as part of the Service Plan update. The impact of the November 2012 Pierce Transit sales tax election and the extension of Sounder service will continue to be on the radar.

Intercity Transit will continue to explore improved connections to Sound Transit services and

other connections. The opening of the expanded Martin Way Park-and-Ride, the Hawks Prairie Park-and-Ride and the Lakewood Station Park-and-Ride provided increased park-and-ride capacity in this corridor.

## **6. Support a range of transportation alternatives.**

Intercity Transit will continue to support and fund a variety of transportation initiatives, all designed to foster a range of alternatives to single occupant auto travel. These efforts include:

- a. Enhance outreach to both employers and employees regarding the economic benefits of the vanpool program.
- b. Continue and expand Intercity Transit's marketing efforts:
  - Expand Intercity Transit's travel training and travel familiarization programs. Focus on Youth Education and safety efforts.
  - Focus marketing and outreach efforts on identified target markets – students, commuters and seniors.
  - More closely coordinate marketing efforts with the Commute Trip Reduction Program.
- c. Enhance Intercity Transit's role as the community's mobility manager and transportation information clearinghouse.
- d. Encourage land use patterns that support public transportation:
  - Advocate and support local jurisdictions' efforts to implement transit supportive development along trunk bus routes. This includes assisting the City of Olympia in the implementation of its Transportation Mobility Strategy. Intercity Transit will coordinate with jurisdictions to ensure zoning ordinances and development standards support alternate modes. Such measures should include:
    - Provision of sidewalks and street lighting.
    - Bus shelters and schedule information at more bus stops.
    - Provision for convenient and safe pedestrian street crossings. This may take the form of signalized intersections, special pedestrian crossings, or pedestrian refuges in the middle of wide thoroughfares, depending upon individual circumstances.
    - Provision for all alternative modes of transportation, including bicycles, ridesharing and vanpools, when appropriate.
    - Convenient pedestrian access to all public buildings and businesses. Pedestrians should not be required to walk through a parking lot to reach a business entrance. While still allowing parking to be located in front of a business, whenever possible, some portion of a building should abut the street.

- Advocate and support local jurisdictions' efforts to implement transit-intensive development in the vicinity of transit nodes. These nodes will be identified in conjunction with each jurisdiction and will represent areas where high-quality transit services on several different routes intersect. In addition to the transit-supportive measures identified above, transit nodes should:
  - Support high-density and mixed-use development patterns, as appropriate.
  - Establish strict limits on the number of parking spaces allowed.
  - Require that all commercial and public buildings be oriented towards the street with any parking oriented toward the rear of the facility.
- Review all development proposals and comment on those impacting public transportation issues. Comments should suggest modifications to development proposals that will both facilitate transit operations (stop and shelter improvements) and those that will make a development more transit supportive. Staff will follow-up at the hearing examiner levels, as appropriate, to ensure Intercity Transit's comments are clear and go on record.

**7. Provide fixed facilities and equipment that support the region's public transit infrastructure.**

Chapter 5 contains discussion and recommendations for the facilities and equipment needed in order to support this service plan.

**SERVICE IMPLEMENTATION PLAN**

The Long-Range Transit Plan outlines five areas of service recommendations for Intercity Transit:

- a. Improve frequency on local routes. Fifteen-minute service should be provided on major corridors. Thirty-minute peak hour service should be provided on all routes.
- b. Improve evening, weekend, and holiday span of service.
- c. Expand express services. Five potential markets are identified:
  - Service to Pierce County
  - Service to King County
    - Intra-Thurston County service
  - Yelm service
  - Lewis County service
- d. New local routes. These routes would serve new areas as well as offering cross-town service such as a proposed route linking the Lacey Transit Center and the Tumwater Town Center area.
- e. Circulators. Expansion of the Dash service type should be considered as activity centers develop.

The last independent review of Intercity Transit's service was conducted in 2006. The short-range and long-range service plan will be updated in 2017.

## **Chapter 5: Capital Plan and Other Plan Elements**

Intercity Transit has been very successful in obtaining both federal and State of Washington grant funds to complete major capital projects. Over the past several years, grants provided funds for the following major capital projects:

- ***Hawks Prairie Park-and-Ride Facility.*** This project was funded by a 2009-2011 and a 2011-2013 State of Washington Regional Mobility grants. The project received approximately \$6,000,000 in grant funding and was completed in late 2012.
- ***Martin Way Park-and-Ride Facility.*** This project more than doubled the capacity of the existing Martin Way Park-and-Ride improved appearance, safety and security. The project was funded by a 2007-2009 Regional Mobility grant with grant funds covering 80% of costs.
- ***Olympia Transit Center.*** The Olympia Transit Center (OTC) expansion is in the design phase with construction expected to begin in 2015 or 2016. The project received two federal grants totaling approximately \$4 million. The total cost of the project is estimated at \$8.2 million.
- ***Pattison Street Facility Underground Storage Tank Replacement.*** This project will replace single walled fuel storage tanks that are over 30 years old and in danger of losing insurance coverage. This project is funding through a Washington State Department of Transportation grant and local funds.
- ***Coach Replacement.*** Intercity Transit began the replacement of 20 buses purchased in 1996, 1998, and in 2010. Six buses were purchased in 2010, seven in 2012, and the final seven were received in 2014. These 20 coaches were funded by a variety of federal discretionary grants covering approximately 80% of the \$14,000,000 cost of the new vehicles. In addition, 3 coaches were funding through the Regional Mobility Grant for express service serving Tumwater to Lakewood. With the ten buses delivered in 2014, additional replacement buses will not be needed until 2018.
- ***Expansion and Replacement Vanpool Vehicles.*** Intercity Transit has been successful in obtaining State of Washington Vanpool Improvement Program funds for expansion and replacement vanpool vehicles over the past several years. These funds provided as much as 80% of the cost of vans. We anticipate being able to obtain funds for future expansion vans, but state funding for replacement vehicles is uncertain. Intercity Transit will need to purchase approximately 38 replacement vehicles per year at a cost of \$800,000 per year. Fortunately, in 2012 federal funds distributed by the Puget Sound Regional Council (PSRC) became available to Intercity Transit. These funds are based on the service and ridership on our regional express and vanpool programs to and from the central Puget Sound area. We received \$605,000 in 2014 and expect to receive a

similar level of funding in future years. These funds will cover 80% of the capital cost of vans serving this area. Approximately 60% of our vanpool currently serves the central Puget Sound.

Intercity Transit has utilized local funds to purchase new and replacement Dial-A-Lift vehicles, computer and telephone equipment, staff vehicles and other smaller capital purchases. Local funds have also been used to complete a Master Site Plan, preliminary engineering and Value Engineering for the Pattison Street Maintenance and Operating facility rehabilitation and expansion project. Local funds were budgeted for final engineering of this project in 2012, removed from consideration with the elimination of federal bus and bus facility dollars under MAP-21 and now under consideration with the passage of the FAST Act. While bus and bus facility dollars were returned to the federal budget under the FAST Act, the dollars are much reduced from prior years. If federal discretionary funds were to become available to us, the expansion of the Pattison Street Operations and Maintenance facility is the major capital project to be undertaken during the six-year period covered by this Strategic Plan update.

**SUMMARY OF MAJOR PROVISIONS - FIXING AMERICA'S  
SURFACE TRANSPORTATION ACT (FAST-DEC 2015) AND MOVING  
AHEAD FOR PROGRESS IN THE 21<sup>ST</sup> CENTURY (MAP-21-JULY 2012)**

MAP-21 eliminated \$984 million for competitive bus and bus facilities programs, moving \$422 million to a formula program and creating a net loss of \$562 million. While formula funds provided stability which enhanced our ability to plan and deliver service, the significant reduction in available dollars and the elimination of competitive discretionary funding had a significant negative effect on our finances. Discretionary grants have traditionally funded 80% of our bus purchases and construction projects. Without those grant funds, replacement of our current fleet, as well as our ability to rehabilitate and expand the Pattison Street Facility, was in question.

Effective with federal FY 2012 apportionments, Intercity Transit began receiving federal 5307 funds through Puget Sound Regional Council (PSRC) based on the level of express and vanpool service we provide in the central Puget Sound region. PSRC's 2014 allocation of federal "earned share" to Intercity Transit was \$ 2,641,795 a 3.8% increase from 2013. Eligible uses include a proportionate amount of future coach replacement costs, a portion of vanpool vehicles, a portion of preventive maintenance costs, a portion of the operating costs of our regional express and vanpool service. We anticipate receiving a similar level of funds from the PSRC's allocation each year. This funding is assumed in our financial model and is allocated to capital preventive maintenance and vanpool replacement in years 2017-2022 as well as future coach replacement.

The FAST Act is a five-year bill which provides some stability but at the end of the five years, it still does not replace funding to pre-MAP-21 levels. MAP-21 eliminated \$984 FAST Act calls for funding at the following levels:

Fiscal Year 2016: \$427.8 million formula and \$268 million competitive.

Fiscal Year 2017: \$436.3 million formula and \$283.6 million competitive.

Fiscal Year 2018: \$445.5 million formula and 301.5 million competitive.

Fiscal Year 2019: \$454.9 million formula and \$322 million competitive.

Fiscal Year 2020: \$464.6 million formula and \$344 million competitive.

## **2017 - 2022 CAPITAL PROGRAMS**

Intercity Transit obtained grant funds for the Olympia Transit Center and for a portion of the Pattison Street Facility UST replacement project. The largest remaining capital projects are the replacement of buses and the rehabilitation and expansion of the Pattison Street Operations and Maintenance Facility. Our hope is to obtain and leverage state funds, along with local dollars to achieved federal grant dollars to rehabilitation the Pattison Street facility and address capacity issues.

The capital program for each year of this Strategic Plan Update is detailed below. The projects below are capital projects proposed for the 2017-2022 Capital Plan and are subject to further review by the Authority.

### **2017 Capital and Non-Recurring Projects**

Replace ACS Orbital/Radio System	5,500,000
Pattison Final Design/Future Enhance	4,100,000
2010 Hybrid Mid-Life Rebuild (6)	1,800,000
Fare Boxes/Smartcards	1,500,000
Purchase Seven DAL Vans	1,092,296
Vanpool Vehicles	656,206
Replace Aging Equipment	432,000
Pattison Roof Replacement	412,000
Pattison Glass Block/Soffit Rep	400,000
Pattison Exterior Painting	200,000
Bus Stop Enhancements/Solar	150,000
LTC, OTC, Amtrak Ext Painting	125,000
Admin Window Replacement	100,000
Fall Protection In Maint Bays	75,000



Pattison Carpet Replacement	75,000
Purchase Facilities Truck	60,000
Purchase Operations Vehicle	40,200
Amtrak Seal Coat/Asphalt Repairs	36,000
Purchase Staff Car	34,500
Martin Way P&R Seal Coat	30,000
Amtrak Gate/Gate Opener	25,000
Engineer Pat Repl Fire/Alarm Sys	25,000
<b>Total 2017 Capital</b>	<b>16,868,202</b>

**2018 Capital and Non-Recurring Projects**

Dial-A-Lift Vans (18 Replacement + 1 Expansion)	3,066,692
Coaches (4 Replacement)	2,143,850
Vanpool Vans (37 Replacement + 11 Expansion)	1,623,806
FleetNet Replacement	500,000
Replace OTC Roof	210,000
Facility Trucks (3 Replacement)	186,288
Pattison Fencing/security/gate openers	150,000
Signal Priority Project	150,000
TMS Replacement	100,000
Pattison Bus Air Shears / Blowers	100,000
Pattison Fire/Security Alarm Replacement	100,000
Bus Stop Improvements	100,000
Ops Service Trucks (2 Replacement)	83,200
Personal Computers	60,000
OTC new building network equipment	60,000
POS system updates - VP in 2014 and OTC in 2018	60,000
Articulated Boom Lift	55,000
Servers - Standard (10 @ 5 yr. cycle)	30,000
Plotter (1/5 Yr.)	15,000
FleetNet Additional Modules	15,000
Storage Area Network (SAN) (1/5YR)	12,000
OTC HVAC # 16- 16a Replacement	12,000
Pattison HVAC #9-9a Replacement	12,000
Ethernet Switches (14/7 YR)	10,000
Bead Blaster	10,000
Pattison HVAC Engineering	9,000
OTC Tile Replacement	8,000
Antivirus Software Upgrades	6,000
Projector Equipment OTC conference room	5,000

**Total Capital 2018** **8,892,836**

**2019 Capital and Non-Recurring Projects**

Pattison Facility Rehabilitation Projects	27,463,203
Hybrid Diesel Coaches (4 Replacement)	3,292,002
Hybrid Mid-Life Rebuilds (7)	2,100,000
FleetNet Replacement	1,500,000
Pattison Electrical Upgrades	1,500,000
Vanpool Vans (30 Replacement + 11 Expansion)	1,435,545
Pattison Tire Bay Mezz w/ stairs	200,000
Pattison Auto Bay Lift Replacements	200,000
Bus Stop Improvements Facilities	100,000
Vehicle Maintenance Service Truck (1 Replacement)	69,900
Facility Truck (1 Replacement)	64,266
Personal Computers	60,000
Village Van Vehicle (1 Replacement)	32,830
Servers - Standard (10 @ 5 yr. cycle)	30,000
Amtrak Floor Tile Replacement	30,000
Pattison Rubber Flooring Replacement	30,000
Spin Balancer	25,000
Ethernet Switches (14/7 YR)	10,000
Wireless access point replacement	5,000
<b>Total Capital 2019</b>	<b>38,147,746</b>

**2020 Capital and Non-Recurring Projects**

Hybrid Diesel Coaches (17 Replacement)	14,410,738
Vanpool Vehicles (55 replacement + 11 Expansion)	2,391,759
Dial-A-Lift Vans (10 replacement + 2 Expansion)	2,074,811
Pattison HVAC #1 thru #8a Replacement	125,000
Bus Stop Improvements Facilities	100,000
Storage Area Network (SAN) (1/5YR)	90,000
Vehicle Maintenance Service Truck (1 Replacement)	72,300
Personal Computers	60,000
Backup Software	55,000
Hawks Prairie Seal Coat	32,000
Servers - Standard (10 @ 5 yr. cycle)	30,000
Amtrak Landscaping (drought tolerant)	25,000
LTC Landscaping (drought tolerant)	25,000
Seal Coat Pattison Parking Lot	18,000
Voice Recorder	15,000

OTC HVAC #15 Replacement	15,000
ID Printer - OTC	12,000
Laptops - Tough Book Type (7/4YR)	10,000
Ethernet Switches (14/7 YR)	10,000
Projectors-Normal replacements	5,500
<b>Total Capital 2020</b>	<b>19,577,108</b>

**2021 Capital and Non-Recurring Projects**

Vanpool Vehicles (49 replacement + 11 Expansion)	2,250,428
Hybrid Mid-Life Rebuilds (5)	1,500,000
Signal Priority Project	200,000
Office Upgrades (130/5yrs)	120,000
Bus Stop Improvements Facilities	100,000
Village Van Vehicle (1 Replacement)	70,337
Servers - High Performance (8 @ 5 yr.)	70,000
Data Deduplication System (Single Sys/5 Yr.)	60,000
Personal Computers	60,000
SharePoint Maintenance/Upgrades	60,000
Tremble Unit	50,000
OTC New Office Bldg. Exterior Painting	50,000
General Staff Van (1 Replacement)	37,600
Windows OS replacement (PC Operating Systems)	35,000
Servers - Standard (10 @ 5 yr. cycle)	30,000
Pattison Landscaping (drought tolerant)	30,000
VMWare Software (8 Units/5 Yrs.)	25,000
Plotter (1/5 Yr.)	15,000
Pattison Trash Compactor	15,000
Storage Area Network (SAN) (1/5YR)	12,000
Ethernet Switches (14/7 YR)	10,000
Adobe Software Upgrades	10,000
<b>Total Capital 2021</b>	<b>4,810,365</b>

**2022 Capital and Non-Recurring Projects**

Hybrid Diesel Coaches (5 Replacement)	4,496,574
Vanpool Vehicles (49 replacement + 11 Expansion)	2,329,193
Hybrid Mid-Life Rebuilds (5)	1,500,000
Yelm Park and Ride	1,500,000
Dial-A-Lift Vans (7 replacement + 21 Expansion)	1,481,726
Tumwater Park and Ride	500,000
Security Cameras for Buildings	300,000

Amtrak Barrel Tile Roof Replacement	110,000
Bus Stop Improvements Facilities	100,000
Personal Computers	60,000
General Staff Vehicle - Electric (1 replacement)	56,300
General Staff Car (1 replacement)	40,900
Pattison Server HVAC #17-18 Replacement	40,000
Firewalls (7 Yr.)	36,000
Servers - Standard (10 @ 5 yr. cycle)	30,000
Amtrak Fire/Security Alarm Replacement	25,000
Ethernet Switches (14/7 YR)	10,000
OTC Carpet Replacement	10,000
Antivirus Software Upgrades	6,000
Wireless access point replacement	5,000
Amtrak Carpet	4,000
<b>Total Capital 2022</b>	<b>12,640,693</b>

The 2017 - 2022 capital program expenses are summarized below. The number is adjusted to reflect capital expenses without the Pattison Street Maintenance and Operations facility rehabilitation project. The elimination of that project removes a projected \$29,739,412 in capital costs in 2019.

<b>CAPITAL PROGRAM SUMMARY</b>	
<b>Year</b>	<b>Total Cost</b>
<b>2017</b>	\$16,868,202
<b>2018</b>	\$8,892,836
<b>2019</b>	\$38,147,746
<b>2020</b>	\$19,577,108
<b>2021</b>	\$4,810,365
<b>2022</b>	\$12,640,693
<b>Total</b>	<b>\$100,936,950</b>

## ANTICIPATED CAPITAL REVENUES

Anticipated federal and State of Washington revenue dedicated to specific capital projects is summarized below. This does not include Capital Maintenance revenue which is used for maintenance-related operating expenses. The cost of completing the design and construction of the Pattison Street maintenance and operating facility is included in the 2019 figure.

### CAPITAL EXPENSES AND REVENUE (WITH PATTISON) 2017-2023

Year	Total cost	Federal revenue	State Revenue	Local
2017	16,868,202	5,709,962	3,159,000	7,999,240
2018	8,892,836	2,822,604	347,698	5,722,534
2019	38,147,746	25,614,482	358,117	12,175,147
2020	19,577,108	11,683,363	368,901	7,524,844
2021	4,810,365	1,460,399	380,063	2,969,903
2022	12,640,693	5,105,119	1,991,615	5,543,959
2023	23,397,646	6,312,043	2,803,571	14,282,032
<b>Total</b>	<b>124,334,596</b>	<b>58,707,972</b>	<b>9,408,965</b>	<b>56,217,659</b>

## PROJECTED BUS REPLACEMENT NEEDS

Other than the Pattison Street Maintenance and Operations Facility expansion and rehabilitation, the major capital expenditures facing Intercity Transit will be the purchase of new buses. Fortunately, Intercity Transit received funding in the last two rounds of discretionary grants and was able to replace seven vehicles in 2014 with 80% federal funding. This will complete bus replacements until 2018. The following table illustrates bus capital needs between 2018 and 2021 assuming buses will be replaced when they are 15 years of age. The standard replacement age is 12 years with Intercity Transit's standard being 15 years. The age range is used to spread purchases over several years rather than having a very large purchase in a single year.

Year	2017	2018	2019	2020	2021	2022	2023
# of Buses		4	4	17		5	18
Estimated Cost	520,352	535,962	823,001	847,691	873,121	899,315	926,294
Total Cost	-	2,143,848	3,292,002	14,410,741	-	4,496,575	16,673,300

The total cost of replacing 48 buses over this six-year period is \$42,409,939.

## **CONCLUSION AND RECOMMENDATIONS**

The economic recession and the elimination of discretionary capital funding with MAP-21 has had a significant impact on the finances of and the ability to support capital projects needed to support current service levels. The agency faces a significant financial challenge beginning in 2017 to meet bus fleet replacement needs. There are 48 buses over a six-year period between 2017 and 2023 required to maintain current service levels. These purchases require a new source of capital funding.

In addition, the agency has significantly outgrown the Pattison Street facility, which due to its age, is in also in need of rehabilitation. In order to serve the current and the growing population as well as the expectations of regional plans, the Pattison Street facility needs to be expanded.

The six-year financial forecast shows Intercity Transit will fall below policy reserve level in 2023. The financial forecast shows Intercity Transit in the red in 2024.

The need for additional funding to address future bus replacements and pursue the Pattison Street project as well as other capital needs should be addressed in 2017. An additional source of capital funds is required. Intercity Transit's goal is to obtain and leverage state funds, along with local dollars to achieved federal grant dollars to rehabilitation the Pattison Street facility and address capacity issues then focus on the replacement of coaches.

## **Chapter 6: Financial Plan**

### **INTRODUCTION: FINANCING THE STRATEGIC PLAN**

The goal of the 2002-2007 Strategic Plan was to implement capital improvements and a level of service by 2006 that could be sustained for the foreseeable future. In February 2006, the third and final phase of the service plan called for in the 2002-2007 plan was implemented. This final phase was expanded by approximately 3,000 hours over the level originally recommended in the 2002 Strategic Plan to meet increased demand for service. Even with this additional 3,000 hours of service, Intercity Transit remained in a strong financial position and implemented an additional service increase of 20,000 hours in February 2008.

In mid-2008, Intercity Transit was hit by two major economic changes. Fuel prices increased

quickly and dramatically to over \$1.00 per gallon over budgeted levels. This affected operating costs directly as Intercity Transit uses approximately 1,000,000 gallons of fuel per year. The sharp increase in oil cost also created higher costs in other products used by Intercity Transit.

The second change was the dramatic slowing of local economic activity. Sales tax revenues for 2008 were 3% below the level received in 2007. This resulted in a revenue shortfall for 2008 of over \$1,000,000. 2009 sales tax revenues were over 10% below 2008 levels resulting in a \$2.3 million revenue shortfall. 2010 sales tax revenues stabilized with revenue approximately one percent higher than 2009.

Intercity Transit received voter approval to increase the local option sales tax for public transportation by 0.2% in August 2010. The new rate of 0.8% was effective on January 1, 2011. This allowed for a modest service increase in February 2011. Sales tax revenue remained stable in 2011 and 2012 and increased by 3.8% in 2013, 4.1% in 2014 and 9% in 2015. The overall result of the economic recession 2008–2012 was a loss of approximately \$14 million in sales tax revenue. Because of the significant need for capital funds, no new service is proposed in this Strategic Plan.

## **FINANCIAL FORECAST AND ASSUMPTIONS**

The financial forecast for 2017-2023 is illustrated in Table 6-1. This forecast includes 20% local funding for the Pattison Street Maintenance and Operations facility construction. This project is not feasible without a new source of funding. This financial outlook is a bit more optimistic considering the return, although at a far reduced amount of, federal bus and bus facility dollars. The forecast projects Intercity Transit will end 2023 with \$694,334 in cash. The year 2024 shows the system approximately \$500,000 in the red.

This forecast includes:

- An addition of 2,000 hours per year of Dial-A-Lift service.
- No fixed-route service increase.
- No change in fares or sales tax rate. The assumptions used in the financial forecast are:
- Sales tax revenue will be 3.0% above the 2016 level. Sales tax revenue is forecast to increase 3.0% per year between 2017 and 2023.
- Health care costs will increase by approximately 10% per year.
- The base fare will remain at the current level.
- Fare revenue will increase by 3.5% per year.
- General inflation will be approximately 3%.

This is a conservative forecast. Fares were increased in early 2013 and Intercity Transit continues to have 0.1% of sales tax capacity. The possibility of additional state or federal funding though the course of this strategic plan is difficult to predict.

**Table 6-1  
Intercity Transit Strategic Plan Financial Forecast  
2017-2023**

Year	2017	2018	2019	2020	2021	2022	2023
Starting Cash	38,621,248	28,229,694	27,182,361	19,098,224	15,276,137	15,517,448	12,666,039
Operating Revenue	46,039,601	46,762,143	48,139,377	49,485,655	50,915,150	52,427,109	53,951,232
Capital Revenue	654,824	3,170,302	25,972,600	12,052,263	1,840,461	7,096,734	9,115,614
Total Revenue	46,694,425	49,932,445	74,111,977	61,537,918	52,755,611	59,523,843	63,066,846
Operating Expense	40,217,776	42,086,942	44,048,367	45,782,894	47,703,935	49,734,558	51,640,903
Capital Expense	16,868,202	8,892,836	38,147,747	19,577,111	4,810,365	12,640,694	23,397,649
Total Expenses	57,085,978	50,979,778	82,196,114	65,360,005	52,514,300	62,375,252	75,038,552
Revenue Expenses	(10,391,554)	(1,047,333)	(8,084,137)	(3,822,087)	241,311	(2,851,409)	(11,971,706)
Ending Cash	28,229,694	27,182,361	19,098,224	15,276,137	15,517,448	12,666,039	694,334
90 Day Reserve	10,054,444	10,521,735	11,012,092	11,445,724	11,925,984	12,433,639	12,910,226
Ending Cash 90 Day Res.	18,175,250	16,660,626	8,086,132	3,830,413	3,591,464	232,400	(12,215,892)

## Chapter 7: Actions

### ACTIONS - 2017

- Examine and monitor all routes in regards to productivity and issues of coverage.
- Continue to engage with the TRPC and WSDOT to consider alternatives for serving Joint Base Lewis-McChord (JBLM) and the I-5 corridor.
- Approach state and federal funding sources to provide assistance in meeting the public transportation demand in the I-5 corridor. This should include funding assistance to maintain and improve current service as a first step of a long-range plan as well as support of the vanpool program.
- Advocate for HOV lanes and other transit prioritization mechanisms.
- Focus on growing the vanpool program.
- Implement and evaluate additional service possibilities as provided through the Regional Mobility Grant program.
- Work with the State to identify and promote adequate parking for Dash service.
- Continue the provision of park-and-ride spaces during the Legislative session at the Farmer's Market.



- Work with area stakeholders to market and cross promote transit in core areas of Olympia, Lacey and Tumwater.
- Work with the State, local jurisdictions and major employers regarding parking and Commute Trip Reduction plans.
- Focus on enhanced service efficiency along congested thoroughfares that provide significant connections to urban corridors and transit facilities. Advocate stop and traffic signal system improvements to the jurisdictions.
- Implementation of the pilot signal preemption program in the Martin Way and Capital corridors.
- Intercity Transit should continue its Youth Education program.
- Intercity Transit should continue to work with schools and youth to teach skills for safe biking, walking and transit use.
- Implement grants to enhance 63 bus stop locations.
- Implementation improvements to web site.
- Continue to pursue WSDOT Vanpool Improvement Program grants to fund replacement vehicle purchases.
- Utilize federal 5307 funds through the Puget Sound Regional Council for travel into the Seattle UZA.
- Pursue and leverage state and federal funding for the Pattison Street facility.
- Pursue joint use agreements to secure park-and-ride space to serve ridesharing, express bus and local transit services.
- Continue to focus on expanding the Travel Training program and the Bus Buddies program.
- Continue to support part-time, grant-funded positions to assist in implementing youth education activities in 2017.
- Continue to support the Build a Bike program in 2017 and find additional sources for bike donations.
- Continue to pursue grant opportunities to supplement the Youth Education program and the Bicycle Commuter Contest.
- Focus on community engagement.
- Intercity Transit should continue to aggressively market its services, and should at a minimum, maintain the current level of marketing and community outreach efforts.
- Intercity Transit should expand its website to better serve our various constituents and to continue to be a relevant business and communications tool for the agency.
- Intercity Transit should continue to pursue outreach communications through social media platforms.
- Increase involvement in local and regional land use planning efforts and advocate for transit-oriented development and other development that encourages the use of transportation alternatives.
- Complete the update of the short and long-range service plan with the assistance of a third-party expert in the field. This will provide a fresh look at our route and schedule structure,

support service resource prioritization and be developed with the valuable input of employees, customers and community members.

- Maintain ISO 14001 certification for the Environmental and Sustainability Management System program.
- Seek funding partnership with Puget Sound Energy to reduce energy and water usage and waste production.
- Continue to utilize environmentally friendly chemicals and materials in all operations, and require their use to the maximum extent possible by vendors and contractors.
- Continue partnerships with the Thurston Green Business group and Puget Sound Energy's Green Power program.
- Staff recommends the Authority maintain its current policy regarding expansion of the PTBA:

The Intercity Transit Authority should consider annexation of new areas only if representatives of these areas request the Authority take steps to hold an annexation election and demonstrate that there is support for the action in the area to be annexed.

## **ACTIONS 2018-2022**

- Intercity Transit should implement the recommendations of the updated service plan.
- Intercity Transit should continue to seek funding to rehabilitate and expand the maintenance and operating facility.
- Intercity Transit should continue to promote vanpooling and ridesharing to meet regional mobility needs.
- Continue to pursue joint use agreements as necessary to secure park and ride space to support ridesharing, express bus and local transit services
- Continue to work with the State of Washington and others to develop a long range plan for public transportation in the corridor.
- Intercity Transit should seek funding assistance and continue to operate the Dash service. If funding is made available, explore service to other concentrations of State employees or facilities.
- Intercity Transit should continue to increase service and ridership in major corridors and maintain the number of corridors with 15-minute service. If more funding becomes available, increase the service frequency.
- Additional equipment is not anticipated to be available to explore local express service. Monitor the results of the "smart" corridors project to help evaluate potential future success.
- Intercity Transit should work with the Thurston Regional Planning Council, the City of Olympia, the City of Lacey, and Thurston County to consider the expansion of the number of intersections and buses equipped to enable signal preemption.
- Intercity Transit should work with school districts to encourage the location of schools in areas served by public transportation and to develop safe paths for walking, biking, and access between transit routes and school facilities.

- Pursue available program funds to upgrade bus stops and shelters.
- Purchase seating and other amenities for stops without shelters which have the most passenger activity.
- Continue a program of bus stop improvements with priority on making all stops ADA-accessible.
- Prioritize bus stop improvements by the level of passenger activity. An emphasis should be given to stops located near facilities serving elderly persons or others with special transportation needs as well as to stops located on major corridors.
- Research and purchase Advanced Communications System replacement.
- Continue improvements to the Web site.
- Continue to pursue WSDOT Vanpool Improvement Program grants to fund new and replacement vehicle purchases.
- Utilize federal 5307 funds through the Puget Sound Regional Council for travel into the Seattle UZA.
- Reserve vehicles slated for surplus if demand exceeds our yearly expansion of ten vehicles.
- Continue to pursue funding to finance the Pattison Street project, new buses and other projects.
- Continue to pursue joint use agreements as necessary to secure park and ride space to support ridesharing, express bus and local transit services.
- Continue to monitor and work with local jurisdictions and the Washington State Department of Transportation regarding potential locations for a park and ride facility.
- Continue support for the Surplus Van Grant, Community Van and Discounted Bus Pass programs. Dependent upon the funding situation, continue to support the Village Van program.
- Continue to pursue improvements in scheduling software and use of technology to improve productivity and service.
- Replace most unreliable vehicles.
- Apply the principles of Universal Design to all capital purchases and projects, and explicitly consider accessibility and usability for the widest range of individuals when evaluating equipment and technology.
- Intercity Transit should work with the Thurston Regional Planning Council, the State of Washington and the affected local jurisdictions to improve the Commute Trip Reduction Program.
- Intercity Transit should continue to coordinate the Bicycle Community Contest and seek grant funding to expand its efforts.
- Intercity Transit should aggressively market high frequency corridor service.
- Intercity Transit should aggressively market the high level of service offered in major corridors.
- Intercity Transit should continue to make use of customer information technology to enhance the customer experience and support service value. A real-time bus arrival

service, such as OneBusAway, should be an ongoing program available to Intercity Transit bus riders.

- Continue implementation of the Sustainability Plan and update as needed.
- New buildings and facilities should meet current green building standards.
- The Intercity Transit Authority should bring together community stakeholders (schools, private business, state and local governments) to explore having a greater role in providing alternative funding for transit services rather than relying on federal funding.
- Maintain its current policy regarding expansion of the PTBA:  
The Intercity Transit Authority should consider annexation of new areas only if representatives of these areas request the Authority take steps to hold an annexation election and demonstrate that there is support for the action in the area to be annexed.

# INTERCITY TRANSIT

## 2014 Annual Report

## 2015-2020 Transit Development Plan



Prepared by the Intercity Transit Executive Department

Approved by the Intercity Transit Authority

August 19, 2015

**INTERCITY**  
TRANSIT

**Intercity Transit Authority:**

**Nathaniel Jones - Chair - City of Olympia**  
**Ryan Warner - Vice Chair - Citizen Representative**  
**Joe Baker - City of Yelm**  
**Ed Bricker - Labor Representative**  
**Bud Blake - Thurston County**  
**Jeff Gadman - City of Lacey**  
**Don Melnick - Citizen Representative**  
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**Intercity Transit complies with all federal requirements under Title VI, which prohibits discrimination on the basis of race, color or national origin.**

If you have any questions concerning this policy or practice please, contact: Intercity Transit, 526 Pattison SE, PO Box 659, Olympia, WA 98507 or by calling the agency's Title VI Officer at: 360.705.5885 or [bholman@intercitytransit.com](mailto:bholman@intercitytransit.com)

This document can be made available in other accessible formats. Please contact Customer Service: 360-786-1881 or outside Thurston County: 1-800-287-6348 TTY: 360-943-5211, Fax: 360-943-8760 or [Customerservice@intercitytransit.com](mailto:Customerservice@intercitytransit.com).

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## **Introduction to Intercity Transit's 2015 - 2020 Transit Development Plan**

This year's Transit Development Plan (TDP) continues a practice adopted by Intercity Transit in 2005. Prior to 2005 the "TDP process" was an opportunity to engage our governing body – the Intercity Transit Authority – our employees, customers and the general public to help define the direction of the transit system for the next six years.

At the time the TDP was combined with the update of the agency's "Strategic Plan," which provided an in-depth process for considering and developing future service designs, capital facilities, equipment, agency policies and other key business strategies. It also served as the basis for developing the coming year's annual budget. The time frame for this process covered several months and was completed each year in June and submitted to the WSDOT as required by Washington State law, RCW 36.57A.

With changes in WSDOT reporting requirements for the TDP in 2004 the current Intercity Transit process, established in 2005, now provides the basic reporting components and sections required under Washington State law. Intercity Transit however, continues to involve the public, agency staff, our Citizen Advisory Committee (CAC) and Transit Authority in annually reviewing and updating our "Strategic Plan," which is a separate process and document. The 'Plan' utilizes components of the TDP, but provides the more in-depth analysis and discussions for developing next year's annual budget (2015) and provides guidance for the future direction of the agency.

This year's "Draft 2014 Annual Report and 2015 – 2020 Transit Development Plan" was presented at the Intercity Transit Authority meeting on July 15, 2015. Distribution of the draft document was then made available the following week on Intercity Transit's web site, at local public libraries, Intercity Transit's Customer Service Center or by contacting Intercity Transit's administrative staff. Local media news were notified about the document. A notice and invitation to the public to comment on the TDP either electronically, by mail, fax, telephone, or in person at a public hearing was provided through the distribution of an on-board Rider Alert newsletter (July, 23rd) with details on our web site and other social media outlets. A public hearing was held at the Transit Authority meeting on August 05, 2015 and final approval completed August 19, 2015.



## Section 1: Organization

This document represents Intercity Transit's annual update of a 5-year Transit Development Plan (TDP), as required under Washington State RCW Section 35.58.2795 and the federal *Moving Ahead for Progress in the 21<sup>st</sup> Century* (MAP-21). This report provides summary information for 2014 as well as projected changes for 2015 - 2020.

Intercity Transit, the business name for the Thurston County Public Transportation Benefit Area (PTBA), was established in September 1980 as authorized by Washington State law, RCW 36.57A. A brief history of the agency follows.

### Agency History

September 1980: Voters from Olympia, Lacey, Tumwater, and the surrounding urban area, approved collection of a sales tax of up to 3/10ths of 1% for the PTBA. On January 1, 1981, the PTBA Authority formally assumed control of local transit services previously operated through an intergovernmental agreement between the cities of Lacey, Olympia, and Tumwater.

May 1992: Further expansion of the Intercity Transit service area occurred. Thurston County voters outside the urban area approved the 3/10ths of 1% sales tax to support the expansion of the PTBA to include all of Thurston County. This included the south county cities and towns and rural areas of unincorporated Thurston County.

1995 - 1999: Local sales tax revenue slowed dramatically and resulted in the gradual reduction of service as a way of balancing service costs with revenues. In March 1999, a proposed 2/10ths of 1% increase in the sales tax for preserving service and a modest expansion failed, forcing an 8% reduction in service. Then in November '99, statewide Initiative 695 passed, which cut Motor Vehicle Excise Tax (MVET) revenue for transit. The courts found it unconstitutional, but the State Legislature subsequently eliminated it for public transit use.

2000 - 2002: The loss of MVET funding resulted in a decrease of 40% in revenue and required a 42% service reduction in February 2000. In early 2002, a Public Transportation Improvement Conference was convened of the jurisdictions in Thurston County resulting in agreement that reduced the service boundary to the urbanized areas of Olympia, Lacey, Tumwater and Yelm. The new boundary, established September 2002, became effective January 2003. In September '02, voters within the new boundary approved an increase of 3/10ths to 6/10ths of 1% in local sales tax. The new rate went into effect in 2003.

2003 - 2005: Incremental service increases in 3 phases began. This reversed a trend that saw over a 50% reduction in fixed-route service since 1995. Both Phase 1 (February '03) and Phase 2 (September '04) included 15% increases in service hours. A new corporate logo, bus graphics, and uniforms were also introduced in '04. During 2005 the focus was on rebuilding the fleet, updating operational software and systems, improving facilities, accessibility and shelters at bus stops and completing market research and ridership studies.

2006 - 2007: Implemented a Phase 3 increase of over 15% in service hours. A circulator route, "Dash," was begun between the Capitol Campus and downtown Olympia. Completed a fixed route Short and Long Range Service Plan; 26 expansion vanpools acquired; installation of a communications system with advanced digital radio, AVL tracking, stop announcements and auto-passenger counters were completed in '07. In '07 a new multi-year service plan and a foundation for technological investments got underway. A small increase in service hours was implemented and upgrading of the fleet included 23 new buses (5 expansion), three Dial-A-Lift vans and 44 vanpools (27 expansion). Total system boardings in '07 increased 12% above '06. A

new education program, "Smart Moves," for middle and high school students began; completed state funded Trip Reduction program with state offices in Tumwater; engaged over 1,000 participants in the annual Bicycle Commuter Contest.

2008 - 2009: An 11% increase in service hours focused on local service enhancements and 15 minute service on major corridors. Expansion of the Martin Way Park & Ride Lot (Lacey) began. Installation of on-board security camera for the fleet was completed. System wide ridership hit new record of over 5.1 million boardings in '08 as fuel prices nationwide rose to \$3.50 gal. Received two national awards in '09: APTA's "Outstanding Public Transportation System" for medium sized systems and FTA's "Success in Enhancing Transit Ridership." Martin Way P&R expansion completed (138 to 319 stalls); completed major market research and ridership studies; completed master site plan for expansion of the operations base and updated plan for the Olympia Transit Center (OTC) expansion; received WSDOT grants to construct a 300 stall P&R on the Thurston County Waste and Recovery Center; and a 'Safe Routes to Schools' program for bicycle youth program at several schools. System's base fare increased from \$.75 to \$1.

2010: First of six hybrid (electric-diesel) buses were acquired as replacements. District voters approved an increase of 0.2% in local sales tax in August. New rate for transit became .8% Jan '11. Plans for the OTC continued including provision for accommodating Greyhound/interstate transit service. Pre-construction got under way for the Hawks Prairie Park & Ride in NE Lacey. A pilot program for discounted bus passes began, aimed at assisting local non-profit and human service agencies dealing with cuts in funding while still trying to meet the needs of their clients. State Legislature approved changes in CTR law that significantly increased affected state agency worksites in Thurston County.

2011: Our 30<sup>th</sup> Anniversary. Implemented a modest 3.1% increase in service focused on improvements for heavily used routes and weekend service. Implemented a website based trip planning feature (Google Maps) and participation in a regional mobile device application for 'next bus' information. Selected by Federal Transit Administration as one of ten transit systems in the nation to receive ISO 14001-certified Environmental and Sustainability Management System training, and implemented objectives for reaching those goals. Continued major capital facility projects for the OTC, Operations Base and the Hawks Prairie P&R Lot. DAL client survey completed. Record ridership on fixed route service, 4.5 million, and 5.3 million for all services (Fixed Route, Dial-A-Lift, Vanpool, Community Vans and Village Vans).

2012: First transit system in the country to be awarded 'Gold Level' APTA Sustainability Commitment status. Continuation of innovative programs including Smart Moves youth outreach and BikePARTners that supports healthy commutes to schools. Bicycle Commuter Contest celebrates 25th Anniversary. Mike Harbour, GM for 17 years, moves on. Ann Freeman-Manzanares, Development Director, appointed Interim GM. Base adult fare increase of 25% approved for fixed route service and a 10% increase for vanpool fares. Demonstration Discounted Pass Program, begun in 2010, approved for future years. New federal legislation under "MAP-21" eliminates discretionary funding for buses and bus facilities.

2013: IITA selects Ann Freeman-Manzanares as new General Manager. Local base fare increased from \$1 to \$1.25. New 332 stall Hawks Prairie Park & Ride Lot officially opens in NE Lacey and receives American Public Works Assoc. "Project of the Year" for Washington State. Agency earns ISO 14001 Certification for Sustainability and Environmental practices, one of only nine transit systems in the country that have earned it to date. Implemented two WSDOT grant funded demonstration Express routes for service between Tumwater/Lakewood and limited Sound Transit peak service between Olympia/Seattle; includes partnering and opening a 30 stall park & ride at a State Dept. of Health lot in Tumwater.

2014: Saw a modest 1% annual increase in fixed route ridership, but our 3<sup>rd</sup> highest ridership year. The 'Walk N Roll' youth outreach program along with Bike PARTners continued to grow and is now in every school district we serve. Technology enhancement included relocating computer servers to a state agency facility in Olympia, which significantly reduced safety issues and remodeling costs on-site. Received Thurston County Chamber of Commerce 'Green Business of the Year Award.'

## Governing Board

The Intercity Transit Authority governs the organization. The board increased to nine members with a state mandated addition of a labor representative in 2010. The other members consist of five elected officials representing the jurisdictions of Thurston County, Lacey, Olympia, Tumwater, and Yelm, plus three citizen representatives appointed by the Transit Authority. Citizen representatives serve three-year terms and elected officials are appointed by their respective jurisdiction. Intercity Transit is the only system in Washington State with citizen members serving on its governing board.

## Table of Organization

At the end of March 2014, Intercity Transit's budget included 317.75 full-time equivalent staff positions (see table below for FTE's and Appendix A for organization chart).

Department	Jan 1 2012	Jan 1 2013	Jan 1 2014	March 2015
<b>Executive</b>	4.5	4.5	3.0	3.0
<b>Human Resources - Assistants &amp; Analysts</b>	4.5	4.5	6.0	6.0
<b>Finance &amp; Administration</b>	10.75	11.0	11.0	11.0
<i>Accounting, Inventory, Clerical,</i>	5.75*	6.0	6.0	6.0
<i>*Information Systems to Maintenance mid '08 back to Finance late-'10</i>	5.0*	5.0	5.0	5.0
<b>Operations:</b>	215.75	221.0	229.0	232.0
<i>Operators</i>	169.0	179.0	185.0	188.0
<i>Customer Service</i>	8.0	8.0	8.0	8.0
<i>Vanpool</i>	5.0	5.0	5.0	5.0
<i>Dial-A-Lift</i>	11.0	11.0	11.0	11.0
<i>Supervisors and Administrative</i>	15.0	15.0	18.0	18.0
<i>*Village Vans to Operations in '10</i>	1.75	2.0	2.0	2.0
<b>Maintenance: (moved under Operations early 2014)</b>	47.0	48.0	47.0	47.0
<i>Coach/Auto Technicians</i>	21.0	22.0	22.0	22.0
<i>Facilities maintenance</i>	7.0	7.0	7.0	7.0
<i>Other Maintenance</i>	19.0	19.0	18.0	18.0
<i>Information Systems to Finance late '10</i>	--	---	---	---
<b>Development – (moved under Executive mid-2013)</b>	18.5	18.25	17.75	18.75
<i>Administration/Grants/Sustainability</i>	4.0	3.0	2.0	2.0
<i>Planning</i>	4.0	4.0	4.0	4.0
<i>Procurement/Inventory</i>	6.0	6.0	6.0	7.0
<i>Marketing &amp; Communications</i>	4.5	5.25	5.75	5.75
<b>Total Employees</b>	301.00	307.25	313.75	317.75

## Section 2: Physical Plant

Intercity Transit dispatches all services from its administrative/operations base facility at 526 Pattison Street SE, Olympia. See Appendices for the completed forms for the State's information about Intercity Transit's rolling stock, owned equipment, and facility inventories.

## Section 3: Service Characteristics - 2014

During 2014, Intercity Transit provided a variety of transportation services benefiting the citizens of Thurston County (See Appendix for service area district maps):

### **Fixed Route Service Operation**

During 2014, 25 fixed routes as well as ADA paratransit (Dial-A-Lift) service were provided. Days of service on weekdays, generally 5:40 a.m. – 11:55 p.m.; Saturdays, generally 8:15 a.m. – 11:55 p.m.; and Sundays between 8:30 a.m. – 9:00 p.m. No service on three national holidays.

Fares: Recovered 12.2% of operating costs for Local service and 13.6% for Express.

Total Boardings: 4,470,324, an increase of 0.82% above 2013.

### **Services for Persons with Disabilities Operation**

“Dial-A-Lift” provides door-to-door service for people with qualified ADA disabilities, which prevents them from using regular bus services. Dial-A-Lift hours of operation reflect all Fixed Route service. No service on three national holidays.

Fares: Recovered about 3.0% of operating costs.

Total Boardings: 154,244, an increase of 2.7% above 2013.

### **2014 Fare Structure for Fixed Route and Dial-A-Lift Service**

Local Service			Express Service		
Fixed Route	Per Ride	Daily Pass	Monthly Pass	Olympia/Tacoma Per Ride	Monthly Pass
Regular Adult	\$1.25	\$2.50	\$36.00	\$3.00	\$90.00
Youth (6 -17 yrs) [Under 5 ride free]	\$1.25	\$2.50	\$15.00	\$3.00	\$90.00
Reduced*	\$.50	\$1.00	\$15.00	\$1.25	\$37.50
<b>Dial-A-Lift</b>	\$1.00	\$2.00	\$36.00	NA	NA
Reduced*			\$15.00*		

\* Reduced Fare Permit required. Eligibility based on age, disability or possession of a Medicare card.

### **Vanpool Services Operation**

By the end of 2014 there were 214 Intercity Transit commuter vanpools in operation throughout the Puget Sound region. This was a decrease from 220 the year before. Over the year, the vanpools carried an average of 1,500 daily riders.

Intercity Transit staff markets the vanpool program to employers and individuals, facilitates group formation and provides defensive driver training. Vanpool groups lease the vehicles on a monthly mileage basis, operate independently and are generally in service weekdays, from 5 a.m. – 6:30 p.m.

Fares: Recovered 96.2% of the operating costs.

Total Boardings: 743,869, a decrease of 2.4% from 2013.

Ridematching: Free service. Intercity Transit is a member of sWashington State Ridematch network that provides a computerized database of individuals interested in carpooling and vanpooling. Established in 1997, it allows commuters the ability to make contacts throughout the state either through a toll free call, over the internet or with a local transit system.

## **Village Vans Operation**

Service began in 2002 for this grant-funded program. Intercity Transit operates with three vans to help meet work-related transportation challenges for families with low incomes. For the 253 individuals that participated in the program, there were a total of 4,169 boardings in 2014 (34.3% decrease from 2013). Of the client base, 71% of those were qualified under Temporary Assistance for Needy Families and 29% were low-income receiving some type of state or federal assistance. Vans are driven by eligible job seekers referred by a variety of agencies to participate in the Village Vans Customized Job Skills Training Program. Eight drivers found good jobs as did dozens of riders while using the service. This innovative program works with representatives from the Departments of Employment Security, Social and Health Services, South Puget Sound Community College, WorkSource Thurston County, Pacific Mountain Workforce Development Council and other local service agencies to support their client needs.

## **Commute Trip Reduction Program**

In 2005, the Thurston region implemented a program transition with a cooperative effort that includes the Thurston Regional Planning Council overseeing program administration and worksite support and Intercity Transit providing outreach and marketing efforts. The partnership continues for the 2013-15 biennium. It makes a commitment to the goals of the CTR law while providing on-going assistance to both local jurisdictions and affected worksites. With the goal of reducing the number of single occupant vehicle trips, vehicle miles traveled, congestion, greenhouse gases, and providing other options for commuters, the region is now required under Senate Bill 6088 that all state worksites and state colleges – no matter the size – in the urban portions of Lacey, Olympia and Tumwater to participate in CTR. Currently, the regional team supports 197 active worksites of which 191 are affected sites and 6 are voluntary.

## **Land Use Review and Support Program**

Intercity Transit is one of a number of local agencies to review land use permitting requests. Staff works with local government staff (Development and Public Works departments), Planning Commissions, as well as public and private developers to maximize the opportunities for public transportation through effective land use planning and urban design. During 2014 staff received 223 submissions, reviewed 52 and commented on 15 applications requesting transit amenities that typically are for a stop, shelter or improved ADA access to an existing stop.

## **Agency Performance**

Intercity Transit actively pursues efforts to improve the internal operations of the agency through improved communications, increased employee involvement and better understanding of the needs and desires of customers and employees. These efforts are aimed at making Intercity Transit a valued employer and enabling employees to effectively serve their customers.

Intercity Transit reviews financial and ridership performance on a monthly basis, and provides regular updates to the Citizen Advisory Committee and the Intercity Transit Authority. Intercity Transit also distributes a yearly “Interchange” newsletter that provides additional transit details and information to stakeholders and the public.

## **Section 4: Service Connections**

In 2014 Intercity Transit provided connections with five other public transit operators, two rural regional service providers, as well as Greyhound and Amtrak service:

**Grays Harbor Transit**      Service between Aberdeen, WA and Olympia’s Capital Mall, Greyhound terminal and the Olympia Transit Center.

<b>Mason County Transit</b>	Service connections between Shelton and Olympia’s Capital Mall and Olympia Transit Center.
<b>Pierce Transit (PT)</b>	IT’s Express service connects with PT’s local service in Lakewood (Lakewood Station and SR 512 P&R Lot) and Tacoma (connections at the Tacoma Dome Station, Tacoma Mall, and at numerous stops in downtown Tacoma.
<b>Sound Transit (ST)</b>	IT funds a limited service ST Route 592 weekday extension between Olympia and DuPont, where it returns to regular service to Seattle. IT’s Express routes also connect with ST service in Lakewood (Lakewood Station and SR 512 P&R Lot), Tacoma Dome Station, and downtown Tacoma. From these locations riders can transfer to ST buses that travel to Seattle and Sea-Tac Airport or to Sounder passenger rail to Seattle.
<b>AMTRAK</b>	Intercity Transit Routes 64 and 94 provide half hour peak and hourly off-peak service 7 days a week to the Olympia-Lacey Centennial Station location.
<b>Greyhound</b>	Four local Intercity Transit routes provide service within a block of the downtown Olympia Greyhound terminal.
<b>Rural Transportation</b> (South Thurston Co - Olympia)	South Thurston County system funded by a WSDOT grant provides regional connections with Intercity Transit routes in a number of locations within our service district.
<b>Park &amp; Ride Lots (P&amp;R)</b>	Fixed routed service available at four lots: Lacey: Martin Way P&R (Local & Express) Hawks Prairie P&R (Express) Tumwater: DOH Lot (Local & Express) Thurston Co: Amtrak rail station (Local)
<b>Educational Facilities</b>	Fixed route service is available to many public and private schools throughout the service district. Of four school districts that exist within Intercity Transit’s service district, 43 of the 50 public schools are served by transit routes. A number of these routes also have schedules that coincide with the school’s opening and closing hours of operation.  Intercity Transit provides service to the Olympia campuses of South Puget Sound Community College and The Evergreen State College. The school’s participate in local Commute Trip Reduction incentives and have transit pass programs for students, faculty and staff. Service is also available to Saint Martin’s University (Lacey), but not onto the campus. The University has a student pass program for undergraduates.

## Section 5: Activities in 2014

Fixed route ridership increased slightly (0.89%) from the year before with 4.49 million boardings and a 0.79% increase overall for all services at 5.39 million boardings. Significant agency activity during the year continued with on-going capital facility project reviews and work on environmental sustainable goals. The effort to limit the use of non-renewable resources, reducing

waste and pollution, promoting public stewardship and protecting the natural environment as much as possible has been incorporated into training of all Intercity Transit staff. This year we prepared for our first 'surveillance' audit of the agency's international ISO 14001 Certification.

Capital facilities involved the continuing effort to accommodate needed growth with retrofitting of the Olympia Transit Center and on-going efforts to secure additional funds for fuel tank replacements at our Pattison Street operations base. Highlights of other agency efforts during the year included:

**New Fleet Vehicles:** Fixed Route – 7 replacement and 3 expansion coaches acquired. Vanpool - 38 replacement and 11 expansion vanpool vehicles were acquired.

**Transit Service:** Service hours increased slightly (2.2%) with the addition of demonstration grant funding of Express service between Tumwater/Lakewood and contracted peak only Sound Transit trips between Olympia/DuPont and Seattle.

**New Shelters and Amenities:** Retrofitted 13 additional shelters with interior solar lighting. Accessibility improvements were added to 25 stops. This included 2 that were completed through private developer improvements and 6 through road improvements.

**Service Planning:** Continued to monitor service and make service adjustments to improve on-time performance and transfer connections. On-going participation with local jurisdictions on road improvement projects as well as regional projects for I-5 (JBLM, various interchanges), SR 101, and the "Smart Corridor" transit priority demonstration project that is now funded for implementation over the next 2 – 3 years.

**Ridership:** System-wide Total Boardings (Fixed Route, DAL and Vanpool) increased 0.79% from 2013. This general increase in ridership reflects ridership increases on weekends. Fixed Route boardings increased 0.89% whereas Vanpooling was down 2.4%, and Dial-A-Lift increased 2.7%.

**Village Van:** This unique 'Welfare-to-Work' transportation program had 4,169 boardings (34.3% decrease reflected lack of volunteer drivers) but provided transportation to 253 low-income job seekers and workers during 2014. This program operates in partnership with 16 local social and public service agencies, including the South Puget Sound Community College and WorkSource Thurston County. The program trains individuals to become skilled employees and provides rides to qualified individuals.

**Vanpool Program:** The 743,869 passenger trips recorded during 2013 was a decrease of 2.4% from the previous year's tally. The decrease reflects an increase in monthly fares and drop from 220 in early 2014 to 214. Groups operate throughout a five countywide region. With certified and trained volunteer drivers in place, these vanpools carried an average of 1,500 daily riders removing over 1,100 vehicles from our congested roadways each weekday.

**Innovative Programs:** Intercity Transit continued the growth of its "Walk N Roll" youth education program throughout the year reaching an estimated 7,000 students in 20 schools through field trips, school assemblies, and special events, and participation in school-wide programs like "Bike and Walk to School Days." Other sponsored programs include classes where students receive a recycled bike and learn maintenance and traffic skills, and PE classes where students learn how to walk and bike to stay healthy and safe. The intent of this award winning program is to build the next generation of safe and healthy bikers, walkers and transit riders. We continued to maintain and improve internet social media to broaden the agency's relevance and relationships with customers and community members. We also provided on-line trip planning for fixed route service and participation in regional smart phone applications for 'next bus' arrival information. Our *Travel Training* and *Bus Buddy* program also works with individuals to help them either transition from paratransit/DAL service to fixed route or to help with people becoming comfortable with riding a bus.

## Section 6: State Proposed Action Strategies 2015 - 2020

The Washington State Department of Transportation (WSDOT) requires transit agencies report how they are accomplishing the state's public transportation objectives as identified in state's Transportation System Policy Goals (RCW 47.04.280). This supersedes WSDOT's "Investment Guidelines" previously requiring listing of accomplishments.

### 1. PRESERVATION

Preserve and extend prior investments in existing transportation facilities and the services they provide to people and commerce.

2014	2015 - 2020
Continued Effort	Continuing Effort

#### 2014

- Programmed funds continued for facility repairs at the central base as well as maintenance of all transit centers.
- Vehicle replacements included 7 coaches and 3 expansion coaches, and 2 replacement vans for Village Vans.
- Vanpool program had 38 replacements and 11 expansion vans which increased the fleet to 257 vans.
- Continued efforts on fuel tank replacements and expanding vehicle parking at Intercity Transit base of operations.
- Continued master plan for expansion of the Olympia Transit Center for fixed route service and an interstate private carrier (Greyhound).
- Implemented two WSDOT Regional Mobility Grants for service enhancements of Express service along the I-5 corridor between Thurston and Pierce Counties. Includes weekday service added between Tumwater - Lakewood and extension of existing ST 592 (DuPont/Seattle) to Olympia.

#### 2015-2020

- Depending on how much local economic recovery might occur it appears that basic service levels may remain the same over the next 3 - 5 years.
- Update fixed route Short (6 yr) and Long Range (20 yr) Service Plan.
- Intercity Transit will continue to provide performance measurement reports that provide summaries to the public providing attributes, costs and utilization of the existing system services.
- Continue to replace aging fleet vehicles but the loss of federal discretionary grant funding has had a major impact on agency finances.
- Continue work on capital facility projects but expansion/remodeling of Operations Base in Olympia will be toward fuel tank replacement and environmental work while the rest of the project is on hold due to change in federal assistance. Continue effort to expand the downtown Olympia Transit Center as a transportation hub, including accommodating Greyhound service.



## **2. SAFETY**

Target construction projects, enforcement, and education to save lives, reduce injuries, and protect property.

<b>2014</b>	<b>2015 - 2020</b>
Made Progress	Continuing Effort

**2014**

- Safety is the system’s #1 priority. A Safety Committee meets monthly and, if necessary, confers on major events. Reviews monthly safety report, maintains ongoing safety records, and makes recommendations to General Manager on issues involving employee and customer safety.
- Outreach program to local schools for “Bike and Walk to School Days.” Other sponsored programs include classes where students receive a recycled bike and learn maintenance and traffic skills and PE classes where students learn how to walk and bike to stay healthy and safe.
- Regular and on-going training of Operations and Maintenance staff as well as other agency support staff, remains a vital component of the organization.
- Participates in local and regional efforts to increase and improve security components within the service district and improve coordination between agencies, especially with local emergency services.
- Added security cameras and upgrades to capture images for service facilities. Cameras dramatically improved the ability to document safety concerns and to provide additional evidence in the case of security and accidents. Camera upgrades also added to park & ride lots.
- Continued participation in the regional coordination of the *Puget Sound Transportation Recovery Plan* for major disruptions to vital transportation facilities and links at both the local and regional level. Began a agency staff committee to review and assemble an *Emergency Preparedness Plan*.

**2015 - 2020**

- Agency will continue to develop programs for agency staff. In-house safety programs and committees meet on a regular basis to review existing conditions with an eye toward making improvements.
- Continue to work and make improvements with other public agencies and school districts regarding safety on both the local and regional level.
- Inter-local project with City of Tumwater to improve on-street Tumwater Sq. transfer station accessibility, pedestrian safety and bus alignments.
- Provide training to ensure understanding and integration of National Incident Management System, the Emergency Preparedness and Security Plan and the continuity of an Operations Plan. Continue to acquire and implement modifications to facilities and vehicles to increase safety and security for customers and employees.

## **3. STEWARDSHIP**

Continuously improve the quality, effectiveness, and efficiency of the transportation system.

<b>2014</b>	<b>2015 - 2020</b>
Continued Effort	Continuing Effort

**2014**

- Intercity Transit continues to be involved with working with local

	<p>jurisdictions and employers to promote the use of alternative transportation modes as well as Transportation Demand Management and Commute Trip Reduction efforts.</p> <ul style="list-style-type: none"> <li>• Active in local and regional partnerships that regularly review, plan, coordinate and implement improvements to the local transportation network of roads, technology and services.</li> <li>• Transit staff regularly attend community business association meetings to update and provide leadership in efforts to support and improve local and regional transportation network.</li> <li>• Actively participate in a coordination network of human service organizations to improve mobility for those challenged by income, age and/or disabilities.</li> <li>• Actively participating in on-going efforts of the regional Sustainability Plan (MPO/TRPC lead) that includes housing and transportation choices.</li> </ul>
<b>2015 - 2020</b>	<ul style="list-style-type: none"> <li>• Staff will continue to work with and participate in community based efforts to improve transportation efficiency in both the technical and service fields.</li> <li>• Staff will actively participate in continuing partnerships that address transportation issues locally and regionally, including but not limited to updates of local Comprehensive Plans, Joint Base Lewis McChord/I-5 impacts, Inter-change Justification Reports (I-5), and Regional Transportation Plan updates.</li> </ul>

**4. MOBILITY**

Facilitate movement of people and goods to contribute to a strong economy and a better quality of life for citizens.

<b>2014</b>	<b>2015 - 2020</b>
Made Progress	Continuing Effort

**2014**

<ul style="list-style-type: none"> <li>• Intercity Transit staff continues to participate in local and state planning efforts to develop and improve alternatives to single occupant vehicles. Staff also takes an active role with regional long range transportation planning activities dealing with congestion and environmental impacts.</li> <li>• Intercity Transit and Thurston Regional Planning Council cooperatively participate in local CTR efforts including promotional marketing efforts with employers around Thurston County. We continued to provide significant education and outreach program efforts to public schools (over 7,000 students). And staff coordinates annual county-wide bicycle commuting contest (May of each year).</li> <li>• Staff regularly participates in local jurisdictional land use reviews, development of community design components (land and roads) and comments on transportation/transit integration and ADA accessibility.</li> <li>• Provided service integration with four other public transit providers, one rural regional service provider, as well as interstate bus and passenger rail service.</li> <li>• Continued regional integration of transportation services for fixed route and Dial-A-Lift (paratransit) services and a commuter Vanpool program as well as a Village Van program for qualified low-income recipients.</li> <li>• Continued fare integration partnerships with public agency employers and</li> </ul>
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colleges that support employees and students use of transit. This included on-going work with WSDOT on state employee's transit 'STAR Pass' program. The pass is available to all State employees working in Thurston County. Locally, student pass programs with the South Puget Sound Community College, Evergreen State College and St. Martin's University continued. Pass agreements with Thurston County, the Thurston Regional Planning Council and City of Olympia continued.

- Intercity Transit staff regularly participates in local and regional meetings and with local, regional, state and tribal staff. Over the past year, the agency continued the regional effort, now funded with federal CMAQ funds, to make improvements in local traffic control technologies that will incorporate a 'transit signal priority' system.
- Continued the two WSDOT Regional Mobility Grants for service enhancements of Express service along the I-5 corridor between Thurston and Pierce Counties.

**2015 - 2020**

- Intercity Transit staff will continue to work proactively on a range of transportation planning activities on the local and state level.
- Additional community based and target marketing efforts will continue.
- The agency will continue to work with the other regional transportation providers to improve service connections between providers.
- Staff will continue to work with local jurisdictions in partnership to improve public transportation accessibility between residential and commercial areas as well as on-going partnerships for road and safety improvements.
- Staff will also continue to work with local jurisdictions, state, and tribal organizations in partnership to improve public transportation in the region for services along state roads and federal interstate.
- Agency will continue to integrate improvements in information technology and transportation services. This includes web-based information, fare payment systems, mobile phone applications, on-street displays and other information materials that encourage and promote transportation alternatives.

**5. ENVIRONMENTAL QUALITY AND HEALTH**

Bring benefits to the environment and our citizens' health by improving the existing transportation infrastructure.

2014	2015 - 2020
Made Progress	Continuing Effort

**2014**

- Intercity Transit continues to utilize biodiesel fuel of a 5 - 20% blend throughout the fleet. All buses run on ultra-low sulfur diesel. The agency meets all on-site water quality standards including recycling antifreeze, engine oil, office paper, cardboard and printer inks.
- In-house Sustainability Committee continued to review and analyze existing conditions, made recommendations for improving the agency's sustainability efforts, developed and provided in-house training of agency staff, and implemented an audit and reporting process.
- Agency staff continues to monitor and track Sustainability Commitment status for Environmental & Sustainability Policies and ISO 14001 certification

**2015 - 2020**

<p>of meeting those standards. Staff continued to coordinated in-house efforts for training, monitoring and improving agency-wide sustainability efforts.</p> <ul style="list-style-type: none"> <li>• On-going effort to coordinate and implement sustainability practices into a variety of transportation related programs and projects around our service district and region. This includes on-going participation with <i>Sustainable Thurston County</i> and <i>Thurston Thrives</i> activities</li> </ul>
<ul style="list-style-type: none"> <li>• Intercity Transit will continue to utilize biodiesel and ultra-low sulfur diesel. Higher blends of biodiesel maybe possible depending on cost.</li> <li>• Implementing testing of synthetic oil for diesel engines, which anticipates a cost savings in total oil consumption and improved vehicle mileage.</li> <li>• Agency core staff will continue work on <i>Environmental and Sustainability Management Systems</i> as a certified agency. Continue the audit and reporting process that “analyze, control and reduce the environmental impact of the agencies activities, products and services and to operate with greater efficiency and control.”</li> <li>• On-going review and consideration of better fixed route coach replacement technologies that provide cleaner diesel engine and lower costs replacement parts than the current fleet of hybrid buses.</li> <li>• Continue growth of the “Smart Moves” youth education program involving students, parents, teachers and community members to help students confidently and safely bicycle, walk, and ride transit. Support healthy choices year-round of biking, walking and transit use, including hosting the annual Thurston County Bicycle Commuter Contest and increasing our outreach efforts at employment sites effected by state and local Commute Trip Reduction requirements.</li> </ul>

**Section 7: Summary of Proposed Changes 2015 - 2020**

In addition to the efforts Intercity Transit will engage in to meet Washington State’s *Transportation System Policy Goals*, the following table provides a summary of proposed changes for service, facilities and equipment over the next six years:

<u>2015</u>	<u>Preservation/Maintain</u>	<u>Expansion</u>
Services	No Change	Fixed Route: 101 hours (Rt 42 extension)
Facilities	Bus stop improvements Facility improvements	Preliminary OTC/Greyhound
Equipment	DAL: 5 Vanpools: 38	DAL: 2 Vanpools: 11
<u>2016</u>	<u>Preservation/Maintain</u>	<u>Expansion</u>
Services	(Express) WSDOT grant funded	Rt 42 extension: 255 hours
Facilities	Bus Stop improvements	No Change
Equipment	DAL: 2 Vanpools: 38	Vanpools: 11

<b><u>2017</u></b>	<b><u>Preservation/Maintain</u></b>	<b><u>Expansion</u></b>
Services	No Change	No Change
Facilities	Bus Stop Improvements (Tumwater Sq Transfer Station)	No Change
Equipment	Vanpools: 38	Vanpools: 11 DAL: 1
<b><u>2018</u></b>	<b><u>Preservation/Maintain</u></b>	<b><u>Expansion</u></b>
Services	No Change	No Change
Facilities	Bus Stop Improvements	No Change
Equipment	Buses: 4 DAL: 18 Vanpools: 37	Vanpools: 11
<b><u>2019</u></b>	<b><u>Preservation/Maintain</u></b>	<b><u>Expansion</u></b>
Services	No Change	No Change
Facilities	Bus Stop Improvements	No Change
Equipment	Buses: 4 Vanpools: 30 Village Vans: 1	DAL: 2 Vanpools: 11
<b><u>2020</u></b>	<b><u>Preservation/Maintain</u></b>	<b><u>Expansion</u></b>
Services	No Change	No Change
Facilities	Bus Stop Improvements Facility Improvements	No Change
Equipment	Buses: 17 DAL: 10 Vanpools: 55	Vanpools: 11

# Section 8: Capital Improvement Program 2014 - 2020

<b>VEHICLE PROJECTIONS</b>	2014	2015	2016	2017	2018	2019	2020
Total Revenue Vehicles at Y/E	366	379	390	402	413	426	437
<b>Fixed Route Coaches</b>							
Beg. Yr. # of Vehicles in Fleet	68	71	71	71	71	71	71
Replacement Vehicles	7	0	0	0	4	4	17
Expansion Vehicles	3						
From Contingency Fleet							
End of Yr. Fleet Size	71	71	71	71	71	71	71
<b>Total Actual Coach Purchases</b>	10	0	0	0	4	4	17
<b>Major Vehicle Components</b>							
2014	2015	2016	2017	2018	2019	2020	
Replacement Batteries				6	0	7	0
<b>Dial-A-Lift Vans</b>							
2014	2015	2016	2017	2018	2019	2020	
Beg. Yr. # of Vehicles in Fleet	35	35	37	37	38	38	40
Replacement Vehicles		5	2	1	18	2	10
Expansion Vehicles		2					
End of Yr. Fleet Size	35	37	37	38	38	40	40
<b>Total Actual DAL Van Purchases</b>	0	7	2	1	18	2	10
<b>Vanpools</b>							
2014	2015	2016	2017	2018	2019	2020	
Beg. Yr. # of Vehicles in Fleet	246	257	268	279	290	301	312
Replacement Vehicles	38	38	38	38	37	30	55
Expansion Vehicles	11	11	11	11	11	11	11
End of Yr. Fleet Size	257	268	279	290	301	312	323
<b>Total Actual Vanpool Purchases</b>	49	49	49	49	48	41	66
<b>Village Vans</b>							
2014	2015	2016	2017	2018	2019	2020	
Beg. Yr. # of Vehicles in Fleet	3	3	3	3	3	3	3
Replacement Vehicles	2				0	1	0
Expansion Vehicles							
End of Yr. Fleet Size	3	3	3	3	3	3	3
<b>Total Actual V/V Van Purchases</b>	2	0	0	0	0	1	0
<b>Total Vehicles Purchased by Year</b>	2014	2015	2016	2017	2018	2019	2020
	61	56	51	50	70	48	93

<b>Vehicle Expenses</b>							
	2014	2015	2016	2017	2018	2019	2020
<b>Coaches</b>							
Coach Unit Cost	723,310	721,000	742,630	764,909	787,856	811,492	835,837
Vehicle Cost Inflation Rate	3.3%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Total Units Purchased	10	0	0	0	4	4	17
<b>Total Expense</b>	<b>7,233,100</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>3,151,425</b>	<b>3,245,967</b>	<b>14,209,222</b>
<b>Major Vehicle Components</b>							
Battery Unit Cost/Mid Life Rehab				300,000	300,000	300,000	300,000
Total Units Purchased		0	0	6	0	7	0
<b>Total Expense</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1,800,000</b>	<b>0</b>	<b>2,100,000</b>	<b>0</b>
<b>Dial-A-Lift Vans</b>							
DAL Van Unit Cost	\$ 140,655	\$ 145,642	\$ 150,673	\$ 155,947	\$ 161,405	\$ 167,054	\$ 172,901
Vehicle Cost Inflation Rate	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%
Total Units Purchased	0	7	2	1	18	2	10
<b>Total Expense</b>	<b>0</b>	<b>1,019,495</b>	<b>301,346</b>	<b>155,947</b>	<b>2,905,287</b>	<b>334,108</b>	<b>1,729,009</b>
<b>Vanpools</b>							
Vanpool Van Unit Cost	\$ 27,674	\$ 27,592	\$ 29,645	\$ 30,683	\$ 31,756	\$ 32,868	\$ 34,018
Total Units Purchased	49	49	49	49	48	41	66
<b>Total Expense</b>	<b>1,356,026</b>	<b>1,352,008</b>	<b>1,452,605</b>	<b>1,503,446</b>	<b>1,524,310</b>	<b>1,347,586</b>	<b>2,245,209</b>
<b>Village Vans</b>							
Village Vans	\$ 27,642	\$ 28,610	\$ 29,611	\$ 30,647	\$ 31,720	\$ 32,830	\$ 33,979
Total Units Purchased	2	0	0	0	0	1	0
<b>Total Expense</b>	<b>55,285</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>32,830</b>	<b>0</b>

<b>Total Expenses</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>
<b>Expenses</b>							
Coaches	7,233,500	0	0	0	3,151,425	3,245,967	14,209,222
Major Vehicle Components	0	0	0	1,800,000	0	2,100,000	0
Dial-A-Lift Vans	0	1,019,495	301,346	155,947	2,905,287	334,108	1,729,009
Vanpools	1,356,018	1,352,000	1,452,605	1,503,446	1,524,310	1,347,586	2,245,209
Village Vans	55,285	0	0	0	0	32,830	0
<b>Total Expenses for Vehicles</b>	<b>8,644,803</b>	<b>2,371,495</b>	<b>1,753,951</b>	<b>3,459,393</b>	<b>7,581,022</b>	<b>7,060,491</b>	<b>18,183,440</b>



<b>Staff Vehicles</b>												
Total Staff Vehicles at Y/E	14	14	15	15	15	15	15	15	15	15	15	15
<b>VM Service Trucks</b>												
Beg. Yr. # of Vehicles in Fleet	2	2	2	2	2	2	2	2	2	2	2	2
Replacement Vehicles					1							
Expansion Vehicles												
End of Yr. Fleet Size	2	2	2	2	2	2	2	2	2	2	2	2
<b>Total Actual VM Service Truck Purchases</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Ops Service Trucks - 5 Year Cycle</b>												
Beg. Yr. # of Vehicles in Fleet	3	3	3	3	3	3	3	3	3	3	3	3
Replacement Vehicles					2							
Expansion Vehicles												
End of Yr. Fleet Size	3	3	3	3	3	3	3	3	3	3	3	3
<b>Total Actual Ops Service Van Purchases</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>General Staff Vans</b>												
Beg. Yr. # of Vehicles in Fleet	1	1	1	1	1	1	1	1	1	1	1	1
Replacement Vehicles												
Expansion Vehicles												
End of Yr. Fleet Size	1	1	1	1	1	1	1	1	1	1	1	1
<b>Total Actual Staff Van Purchases</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>General Staff Car</b>												
Beg. Yr. # of Vehicles in Fleet	2	2	2	2	2	2	2	2	2	2	2	2
Replacement Vehicles												
Expansion Vehicles												
End of Yr. Fleet Size	2	2	2	2	2	2	2	2	2	2	2	2
<b>Total Actual Staff Car Purchases</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>General Staff Car - Electric</b>												
Beg. Yr. # of Vehicles in Fleet	1	2	2	2	2	2	2	2	2	2	2	2
Replacement Vehicles												
Expansion Vehicles	1											
End of Yr. Fleet Size	2	2	2	2	2	2	2	2	2	2	2	2
<b>Total Actual Staff Car Purchases</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>General Staff Station Wagon</b>												
Beg. Yr. # of Vehicles in Fleet	1	1	1	1	1	1	1	1	1	1	1	1
Replacement Vehicles												
Expansion Vehicles												
End of Yr. Fleet Size	1	1	1	1	1	1	1	1	1	1	1	1
<b>Total Actual Staff Station Wagon Purchases</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

	2014	2015	2016	2017	2018	2019	2020
<b>Facility Truck</b>							
Beg. Yr. # of Vehicles in Fleet	5	5	5	6	6	6	6
Replacement Vehicles			1		3		
Expansion Vehicles				1			
End of Yr. Fleet Size	5	5	6	6	6	6	6
<b>Total Actual Facility Truck Purchases</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>3</b>	<b>1</b>	<b>0</b>
<b>Facility Maintenance Trailers</b>							
Beg. Yr. # of Vehicles in Fleet	0	0	1	1	1	1	1
Replacement Vehicles		1					
Expansion Vehicles							
End of Yr. Fleet Size	0	1	1	1	1	1	1
<b>Total Actual Facility Truck Purchases</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total Staff Vehicles Purchased by Year</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>3</b>	<b>5</b>	<b>1</b>	<b>0</b>
<b>Vehicle Expenses and Revenues</b>							
<b>VM Service Trucks</b>							
VM Service Truck Unit Cost	58,800	60,900	63,000	65,200	67,500	69,900	72,300
Vehicle Cost Inflation Rate	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%
Total Units Purchased	0	0	0	1	1	0	0
<b>Total Expense</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>65,200</b>	<b>67,500</b>	<b>0</b>	<b>0</b>
<b>Ops Service Trucks</b>							
Op Service Van Unit Cost	36,200	37,500	38,800	40,200	41,600	43,100	44,600
Vehicle Cost Inflation Rate	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%
Total Units Purchased	0	0	0	2	1	0	0
<b>Total Expense</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>80,400</b>	<b>41,600</b>	<b>0</b>	<b>0</b>
<b>General Staff Vans</b>							
General Staff Van Unit Cost	29,600	30,600	31,700	32,800	33,900	35,100	36,300
Vehicle Cost Inflation Rate	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%
Total Units Purchased	0	0	0	0	0	0	0
<b>Total Expense</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

	2014	2015	2016	2017	2018	2019	2020
<b>General Staff Car</b>							
General Staff Car Unit Cost	31,100	32,200	33,300	34,500	35,700	36,900	38,200
Vehicle Cost Inflation Rate	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%
Total Units Purchased	0	0	0	0	0	0	0
<b>Total Expense</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>General Staff Car - Electric</b>							
General Staff Car Unit Cost	42,800	44,300	45,800	47,400	49,100	50,800	52,600
Vehicle Cost Inflation Rate	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%
Total Units Purchased	1	0	0	0	0	0	0
<b>Total Expense</b>	<b>42,800</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>General Staff Station Wagon</b>							
General Staff Station Wagon Unit Cost	25,400	26,300	27,200	28,200	29,200	30,200	31,300
Vehicle Cost Inflation Rate	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%
Total Units Purchased	1	0	0	0	0	0	0
<b>Total Expense</b>	<b>25,400</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Facility Truck</b>							
Facility Truck Unit Cost	69,000	71,415	73,910	76,492	79,165	81,930	84,793
Vehicle Cost Inflation Rate	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%
Total Units Purchased	0	0	1	0	3	1	0
<b>Total Expense</b>	<b>0</b>	<b>0</b>	<b>73,910</b>	<b>0</b>	<b>237,494</b>	<b>81,930</b>	<b>0</b>

Facility Trailers	2014	2015	2016	2017	2018	2019	2020
Facility Trailer Unit Cost	10,000	15,000	10,800	11,200	11,600	12,000	12,400
Vehicle Cost Inflation Rate	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%
Total Units Purchased	0	1	0	0	0	0	0
<b>Total Expense</b>	<b>0</b>	<b>15,000</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total Expenses/Revenues</b>							
Expenses	2014	2015	2016	2017	2018	2019	2020
VM Service Trucks	0	0	0	65,200	67,500	0	0
Ops Service Vans	0	0	0	80,400	41,600	0	0
General Staff Vans	0	0	0	0	0	0	0
General Staff Car	0	0	0	0	0	0	0
General Staff Car - Electric	42,800	0	0	0	0	0	0
General Staff Station Wagon	25,400	0	0	0	0	0	0
Facility Truck	0	0	73,910	0	237,494	81,930	0
Facility maintenance Trailers	0	15,000	0	0	0	0	0
<b>Total Expenses for Staff Vehicles</b>	<b>68,200</b>	<b>15,000</b>	<b>73,910</b>	<b>145,600</b>	<b>346,594</b>	<b>81,930</b>	<b>0</b>

<b>OTHER CAPITAL AND FACILITIES-Amended</b>										
	2014	2015	2016	2017	2018	2019	2020			
<b>MIS &amp; Communication Equipment</b>										
FleetNet Replacement	400,000	500,000								
Data Deduplication System (Single Sys/5 Yr)			60,000							
Laptops - Tough Book Type (7/4YR)			10,000							10,000
Personal Computers	30,000	60,000	60,000	60,000	60,000	60,000	60,000			60,000
Phone System Replacement	50,000		150,000							
Plotter (1/5 Yr)			15,000							
Projector Equipment OTC conference room			5,000							5,500
Projectors-Normal replacements			5,500							12,000
ID Printer - OTC		6,000								15,000
Voice Recorder		15,000								
Security Cameras (Lenel) for Buildings			130,000							
Servers - High Performance (8 @ 5 yr)			70,000							
Servers - Standard (10 @ 5 yr cycle)	30,000	30,000	30,000	30,000	30,000	30,000	30,000			30,000
Storage Area Network (SAN) (1/5YR)		90,000	12,000		12,000					90,000
Tremble Unit										
<b>Network Hardware</b>										
Ethernet Switches (14/7 YR)	10,000	10,000	10,000	150,000	10,000	10,000	10,000			10,000
Fiber Optics/High Speed Links	60,000									
Firewalls (7 Yr)	36,000									
Network Wiring (10 year cycle)										
OTC new building network equipment			60,000							
Wireless access point replacement				5,000						
<b>Software</b>										
ACS Orbital/Radio System Replacement	9,000					2,000,000	2,000,000			
Analytical Software Used by Development										
Adobe Software Upgrades			10,000							
Antivirus Software Upgrades						6,000				55,000
Backup Software		55,000								
FleetNet Additional Modials	15,000					15,000				
FleetWatch										
Microsoft Server Software Upgrades/Repl.				130,000						
Office Upgrades (130/5yrs)	20000	15,000	120,000							
POS system updates - VP in 2014 and OTC in 2018						60,000				
Routermatch Replacement										
SharePoint Maintenance/Upgrades			60,000							
TMS Replacement										
VMWare Software (8 Units/5 Yrs)			25,000			100,000				
Windows OS replacement (PC Operating Systems)			35,000							
<b>Total</b>	<b>\$800,152</b>	<b>\$781,000</b>	<b>\$737,500</b>	<b>\$375,000</b>	<b>\$293,000</b>	<b>\$2,100,000</b>	<b>\$2,287,500</b>			

Facilities	2014	2015	2016	2017	2018	2019	2020
Amtrak Floor Tile Replacement				30,000			
Amtrak Airconditioner							
Air Compressors (2)							
Catwalk Around Heat Recovery Units							
GROUT & Seal Pattison Bus Lot							18,000
Seal Coat Pattison Parking Lot							
Reverse Osmosis							
Lighting Upgrade - Main Fac							
Interior Paint Amtrak							
Replace Gasoline Pump							
Glass Block and Soffit Replacement - Both Pattison Facilities				400,000			
Replace Roof - Pattison, Both Facilities				412,000	210,000		
Replace OTC Roof							
Pattison Carpet Replacement			50,000				
Pattison Mezzanine Replacement						14,000	
Amtrak Seal Coat/Repairs			36,000				
Amtrak Barrel Tile Roof Replacement							
Amtrak Carpet			8,000				
OTC Tile Replacement							
OTC HVAC Replacement		50,000		9,000			
OTC Interior Painting							
Marlin Way P&R Seal Coat (7 yrs)			30,000				
Exterior Painting All Facilities (7 yrs)			325,000				
Interior Painting Pattison (10 yrs)			250,000		9,000		
Pattison HVAC Engineering							
Pattison HVAC #9-9a Replacement					12,000		
OTC HVAC # 16- 16a Replacement					12,000		32,000
Hawks Prairie Seal Coat							
Pattison HVAC #1 thru #8a Replacement							125,000
OTC HVAC #15 Replacement							15,000
OTC Carpet Replacement							
Pattison Server HVAC #17-18 Replacement							
LTC Interior Painting (10 yrs)			5,000				
LTC Roof Replacement							
Pattison Concrete Slab Replacement							
Pattison Rubber Flooring Replacement						30,000	
Pattison ECO Lift (5 Bays) Replacement							
Pattison Chassis Wash Lift Replacement							
Pattison Auto Bay Lift Replacements						200,000	
Pattison Tire Bay Mezz w/stairs			200,000				
Pattison Jib Crane (Tailer / battery packs)			200,000				
Pattison Additional Fall Protection in bays				75,000			
Pattison Fill Pits/road 2 Eco Lifts				450,000			
Pattison Bus Air Shears / Blowers					100,000		
Pattison Office Window Replacement			100,000				
Pattison Lube Room Renovation	600,000						
Pattison UST Tank Replacement	3,400,000						
Pattison Facility Rehabilitation Projects			3,500,000			27,463,203	
Pattison Landscaping (drought tolerant)			30,000				
LTC Landscaping (drought tolerant)			25,000				
Amtrak Landscaping (drought tolerant)			25,000				
Pattison Electrical Upgrades						1,500,000	
Pattison Trash Compactor							
Pattison Maint Office Renovation			400,000				
Pattison Fencing/security/gate openers				150,000			
Amtrak Gate Opener				25,000			
Pattison Fire/Security Alarm Replacement			100,000				
Amtrak Fire/Security Alarm Replacement							
OTC Fire/Security Alarm Replacement							
OTC New Office Bldg Interior Painting							
OTC New Office Bldg Exterior Painting							
<b>Total</b>	<b>\$4,000,000</b>	<b>\$50,000</b>	<b>\$5,284,000</b>	<b>\$1,551,000</b>	<b>\$343,000</b>	<b>\$29,207,203</b>	<b>\$190,000</b>

	2014	2015	2016	2017	2018	2019	2020
<b>Intelligent Transportation Systems Projects</b>							
Expansion							
Signal Priority Project				150,000			
Replacement							
Advanced Communications Systems			1,050,000				
Fare boxes/Smartcards		-	1,050,000	150,000			
<b>Total</b>							
<b>Shop Equipment</b>							
Replace Two Bus Washers	2014	2015	2016	2017	2018	2019	2020
Hotly Parts Washer			15,000				
Tire Machine			20,000				
Spin Balancer						25,000	
Bead Blaster			10,000				
Articulated Boom Lift				55,000			
<b>Total</b>	\$0	\$0	\$45,000	\$55,000	\$0	\$25,000	\$0
<b>FACILITIES &amp; LAND</b>							
Bus Stop Improvements Facilities	2014	2015	2016	2017	2018	2019	2020
Bus Stop Improvements - Planning	150,000		100,000	100,000	100,000	100,000	100,000
Additional Grant Work OTC	197,900						
Pattison Street Phase I	8,729,382						
Pattison Street Phase II							
Pattison Street Phase III							
Pattison Street Preliminary Engineering/Construction							
<b>Total</b>	\$9,077,282	\$0	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
<b>TRANSIT CENTERS &amp; PARK and RIDES</b>							
Turnwater Park and Ride	2014	2015	2016	2017	2018	2019	2020
Yelm Park and Ride							
<b>Total</b>	-	-	-	-	-	-	-
<b>TOTAL OTHER CAPITAL COSTS</b>	\$13,877,434	\$831,000	\$7,216,500	\$2,231,000	\$736,000	\$31,432,203	\$2,577,500

## Section 9: Operating Revenues 2014 - 2020

WSDOT Report - 2014	General Fund	Working Capital	Total
<b>Beginning Balance January 1, 2014</b>	<b>\$16,316,631</b>	<b>\$8,097,840</b>	<b>\$24,414,471</b>
<b>Revenues</b>			
Sales Tax	30,455,804		30,455,804
Motor Vehicle Excise Tax			-
Farebox	5,046,616		5,046,616
Sales Tax Equalization			
Federal Operating Grants	3,948,818		3,948,818
State Operating Grants	1,759,477		1,759,477
Other	3,736,113		3,736,113
Contribution To Accounts	(1,339,251)	1,339,251	-
<b>Total Available</b>	<b>\$59,924,208</b>	<b>\$9,437,091</b>	<b>\$69,361,299</b>
<b>Operating Expenses</b>			
Vanpool/Rideshare P&M	2,057,523		2,057,523
Vanpool/Rideshare System Expansion	102,876		102,876
Fixed Route P&M	21,672,985		21,672,985
Fixed Route System Expansion			-
Commuter Bus P&M	2,175,224		
Commuter Bus System Expansion			
Paratransit ADA P&M	7,555,315		7,555,315
Paratransit ADA System Expansion	-		-
Rideshare/CTR P&M	-		-
Amtrak Station P&M	56,153		56,153
Annual Depreciation	5,737,335		5,737,335
Contribution To Accounts			-
<b>Total Expenses</b>	<b>\$39,357,411</b>	<b>-</b>	<b>\$39,357,411</b>
<b>Add Back Depreciation</b>	<b>5,737,335</b>		<b>5,737,335</b>
<b>Net Cash Available</b>	<b>\$26,304,132</b>		<b>\$26,304,132</b>
<b>Capital</b>			
<b>Capital Revenue</b>			
Federal Capital Grant - Sec 5307			
Federal Capital Grant - Sec 5309	5,154,527		5,154,527
State Capital Grants	1,245,583		1,245,583
<b>Total Capital Revenue</b>	<b>\$6,400,110</b>	<b>-</b>	<b>\$6,400,110</b>
<b>Capital Expenses</b>			
System P&M			
Equipment & Furnishings			-
Replace Coaches -	4,927,359		4,927,359
Replace Shuttle Vans/Small Coaches			-
Replace DAL Vans -	49,656		49,656
Replace Vanpool Vans -	1,044,969		1,044,969
Replace Staff Vehicles			-
Facilities	532,389		
System Expansion			-
Coach -	2,111,725		2,111,725
Shuttle Van - Small Coach			-
DAL Van			-
Vanpool Van	261,242		261,242
Facilities	19,358		19,358
<b>Total Capital Expenses</b>	<b>\$8,946,698</b>		<b>\$8,946,698</b>
<b>Ending Balance December 31, 2014</b>	<b>\$23,757,544</b>	<b>\$9,437,091</b>	<b>\$33,194,635</b>



<b>WSDOT Report - 2015</b>	<b>General Fund</b>	<b>Working Capital</b>	<b>Total</b>
<b>Beginning Balance January 1, 2015</b>	<b>\$23,757,544</b>	<b>\$9,437,091</b>	<b>\$33,194,635</b>
<b>Revenues</b>			
Sales Tax	31,209,000		31,209,000
Motor Vehicle Excise Tax			-
Farebox	4,906,530		4,906,530
Sales Tax Equalization			
Federal Operating Grants	4,641,589		4,641,589
State Operating Grants	530,922		530,922
Other	1,081,208		1,081,208
Contribution To Accounts	(140,327)	140,327	-
<b>Total Available</b>	<b>\$65,986,466</b>	<b>\$9,577,418</b>	<b>\$75,563,884</b>
<b>Operating Expenses</b>			
Vanpool/Rideshare P&M	2,519,386		2,519,386
Vanpool/Rideshare System Expansion	119,971		119,971
Fixed Route P&M	25,154,356		25,154,356
Fixed Route System Expansion			-
Commuter Bus P&M	2,536,675		
Commuter Bus System Expansion			
Paratransit ADA P&M	8,810,761		8,810,761
Paratransit ADA System Expansion	-		-
Rideshare/CTR P&M	-		-
Amtrak Station P&M	65,484		65,484
Annual Depreciation	5,909,455		5,909,455
Contribution To Accounts			-
<b>Total Expenses</b>	<b>\$45,116,088</b>	<b>-</b>	<b>\$45,116,088</b>
<b>Add Back Depreciation</b>	<b>5,909,455</b>		<b>5,909,455</b>
<b>Net Cash Available</b>	<b>\$26,779,833</b>		<b>\$26,779,833</b>
<b>Capital</b>			
<b>Capital Revenue</b>			
Federal Capital Grant - Sec 5307			
Federal Capital Grant - Sec 5309	5,687,815		5,687,815
State Capital Grants	288,336		288,336
<b>Total Capital Revenue</b>	<b>\$5,976,151</b>	<b>-</b>	<b>\$5,976,151</b>
<b>Capital Expenses</b>			
System P&M			
Equipment & Furnishings	792,780		792,780
Replace Coaches -			-
Replace Shuttle Vans/Small Coaches			-
Replace DAL Vans -	727,889		727,889
Replace Vanpool Vans -	1,045,000		1,045,000
Replace Staff Vehicles	88,500		88,500
Facilities	4,465,000		
System Expansion			-
Coach -			-
Shuttle Van - Small Coach			-
DAL Van	291,156		291,156
Vanpool Van	302,500		302,500
Facilities	8,194,782		8,194,782
<b>Total Capital Expenses</b>	<b>15,907,607</b>		<b>\$15,907,607</b>
<b>Ending Balance December 31, 2015</b>	<b>\$16,848,377</b>	<b>\$9,577,418</b>	<b>\$26,425,795</b>

<b>WSDOT Report - 2016</b>	<b>General Fund</b>	<b>Working Capital</b>	<b>Total</b>
<b>Beginning Balance January 1, 2016</b>	<b>\$16,848,377</b>	<b>\$9,577,418</b>	<b>\$26,425,795</b>
<b>Revenues</b>			
Sales Tax	32,145,270		32,145,270
Motor Vehicle Excise Tax			-
Farebox	5,206,939		5,206,939
Sales Tax Equalization			
Federal Operating Grants	4,309,156		4,309,156
State Operating Grants	385,922		385,922
Other	955,234		955,234
Contribution To Accounts	-	-	-
<b>Total Available</b>	<b>\$59,850,898</b>	<b>\$9,577,418</b>	<b>\$69,428,316</b>
<b>Operating Expenses</b>			
Vanpool/Rideshare P&M	2,727,093		2,727,093
Vanpool/Rideshare System Expansion	123,959		123,959
Fixed Route P&M	23,666,320		23,666,320
Fixed Route System Expansion			-
Commuter Bus P&M	2,620,997		2,620,997
Commuter Bus System Expansion			
Paratransit ADA P&M	9,103,642		9,103,642
Paratransit ADA System Expansion	-		-
Rideshare/CTR P&M	-		-
Amtrak Station P&M	67,661		67,661
Annual Depreciation	6,086,739		6,086,739
Contribution To Accounts			-
<b>Total Expenses</b>	<b>\$44,396,411</b>	<b>-</b>	<b>\$44,396,411</b>
<b>Add Back Depreciation</b>	<b>6,086,739</b>		<b>6,086,739</b>
<b>Net Cash Available</b>	<b>\$21,541,226</b>		<b>\$21,541,226</b>
<b>Capital</b>			
<b>Capital Revenue</b>			
Federal Capital Grant - Sec 5307			
Federal Capital Grant - Sec 5309	729,749		729,749
State Capital Grants	310,877		310,877
<b>Total Capital Revenue</b>	<b>\$1,040,626</b>	<b>-</b>	<b>\$1,040,626</b>
<b>Capital Expenses</b>			
System P&M			
Equipment & Furnishings	1,932,500		1,932,500
Replace Coaches -			-
Replace Shuttle Vans/Small Coaches			-
Replace DAL Vans -	301,346		301,346
Replace Vanpool Vans -	1,126,510		1,126,510
Replace Staff Vehicles	73,910		73,910
Facilities	5,284,000		5,284,000
System Expansion			-
Coach -			-
Shuttle Van - Small Coach			-
DAL Van			-
Vanpool Van	326,095		326,095
Facilities			-
<b>Total Capital Expenses</b>	<b>\$9,044,361</b>		<b>\$9,044,361</b>
<b>Ending Balance December 31, 2016</b>	<b>\$13,537,491</b>	<b>\$9,577,418</b>	<b>\$23,114,909</b>

<b>WSDOT Report - 2017</b>	<b>General Fund</b>	<b>Working Capital</b>	<b>Total</b>
<b>Beginning Balance January 1, 2017</b>	<b>\$13,537,491</b>	<b>\$9,577,418</b>	<b>\$23,114,909</b>
<b>Revenues</b>			
Sales Tax	33,109,628		33,109,628
Motor Vehicle Excise Tax			-
Farebox	5,397,859		5,397,859
Sales Tax Equalization			
Federal Operating Grants	4,340,750		4,340,750
State Operating Grants	385,922		385,922
Other	901,501		901,501
Contribution To Accounts	(398,122)	398,122	-
<b>Total Available</b>	<b>\$57,275,029</b>	<b>\$9,975,540</b>	<b>\$67,250,569</b>
<b>Operating Expenses</b>			
Vanpool/Rideshare P&M	2,931,252		2,931,252
Vanpool/Rideshare System Expansion	127,446		127,446
Fixed Route P&M	24,719,439		24,719,439
Fixed Route System Expansion			-
Commuter Bus P&M	2,694,727		2,694,727
Commuter Bus System Expansion			
Paratransit ADA P&M	9,359,731		9,359,731
Paratransit ADA System Expansion	-		-
Rideshare/CTR P&M	-		-
Amtrak Station P&M	69,564		69,564
Annual Depreciation	6,269,341		6,269,341
Contribution To Accounts			-
<b>Total Expenses</b>	<b>\$46,171,500</b>	<b>-</b>	<b>\$46,171,500</b>
<b>Add Back Depreciation</b>	<b>6,269,341</b>		<b>6,269,341</b>
<b>Net Cash Available</b>	<b>\$17,372,870</b>		<b>\$17,372,870</b>
<b>Capital</b>			
<b>Capital Revenue</b>			
Federal Capital Grant - Sec 5307			
Federal Capital Grant - Sec 5309	744,344		744,344
State Capital Grants	320,007		320,007
<b>Total Capital Revenue</b>	<b>\$1,064,351</b>	<b>-</b>	<b>\$1,064,351</b>
<b>Capital Expenses</b>			
System P&M			
Equipment & Furnishings	2,081,000		2,081,000
Replace Coaches -	1,800,000		1,800,000
Replace Shuttle Vans/Small Coaches			-
Replace DAL Vans -	155,947		155,947
Replace Vanpool Vans -	1,165,938		1,165,938
Replace Staff Vehicles	145,600		145,600
Facilities			
System Expansion			-
Coach -			-
Shuttle Van - Small Coach			-
DAL Van			-
Vanpool Van	337,508		337,508
Facilities	150,000		150,000
<b>Total Capital Expenses</b>	<b>\$5,835,993</b>		<b>\$5,835,993</b>
<b>Ending Balance December 31, 2016</b>	<b>\$12,601,228</b>	<b>\$9,975,540</b>	<b>\$22,576,768</b>

<b>WSDOT Report - 2018</b>	<b>General Fund</b>	<b>Working Capital</b>	<b>Total</b>
<b>Beginning Balance January 1, 2018</b>	<b>\$12,601,228</b>	<b>\$9,975,540</b>	<b>\$22,576,768</b>
<b>Revenues</b>			
Sales Tax	34,102,917		34,102,917
Motor Vehicle Excise Tax			-
Farebox	5,592,755		5,592,755
Sales Tax Equalization			
Federal Operating Grants	4,378,438		4,378,438
State Operating Grants	385,922		385,922
Other	903,660		903,660
Contribution To Accounts	(400,238)	400,238	-
<b>Total Available</b>	<b>\$57,564,682</b>	<b>\$10,375,778</b>	<b>\$67,940,460</b>
<b>Operating Expenses</b>			
Vanpool/Rideshare P&M	3,137,320		3,137,320
Vanpool/Rideshare System Expansion	130,722		130,722
Fixed Route P&M	25,799,407		25,799,407
Fixed Route System Expansion			-
Commuter Bus P&M	2,763,993		
Commuter Bus System Expansion			
Paratransit ADA P&M	9,600,318		9,600,318
Paratransit ADA System Expansion	-		-
Rideshare/CTR P&M	-		-
Amtrak Station P&M	71,353		71,353
Annual Depreciation	6,457,421		6,457,421
Contribution To Accounts			-
<b>Total Expenses</b>	<b>\$47,960,533</b>	<b>-</b>	<b>\$47,960,533</b>
<b>Add Back Depreciation</b>	<b>6,457,421</b>		<b>6,457,421</b>
<b>Net Cash Available</b>	<b>\$16,061,570</b>		<b>\$16,061,570</b>
<b>Capital</b>			
<b>Capital Revenue</b>			
Federal Capital Grant - Sec 5307			
Federal Capital Grant - Sec 5309	2,477,692		2,477,692
State Capital Grants	329,457		329,457
<b>Total Capital Revenue</b>	<b>\$2,807,149</b>	<b>-</b>	<b>\$2,807,149</b>
<b>Capital Expenses</b>			
System P&M			
Equipment & Furnishings	636,000		636,000
Replace Coaches -	3,151,422		3,151,422
Replace Shuttle Vans/Small Coaches			-
Replace DAL Vans -	2,905,287		2,905,287
Replace Vanpool Vans -	1,174,992		1,174,992
Replace Staff Vehicles	346,594		346,594
Facilities	100,000		100,000
System Expansion			-
Coach -			-
Shuttle Van - Small Coach			-
DAL Van			-
Vanpool Van	349,322		349,322
Facilities			-
<b>Total Capital Expenses</b>	<b>\$8,663,617</b>		<b>\$8,663,617</b>
<b>Ending Balance December 31, 2016</b>	<b>\$10,205,102</b>	<b>\$10,375,778</b>	<b>\$20,580,880</b>

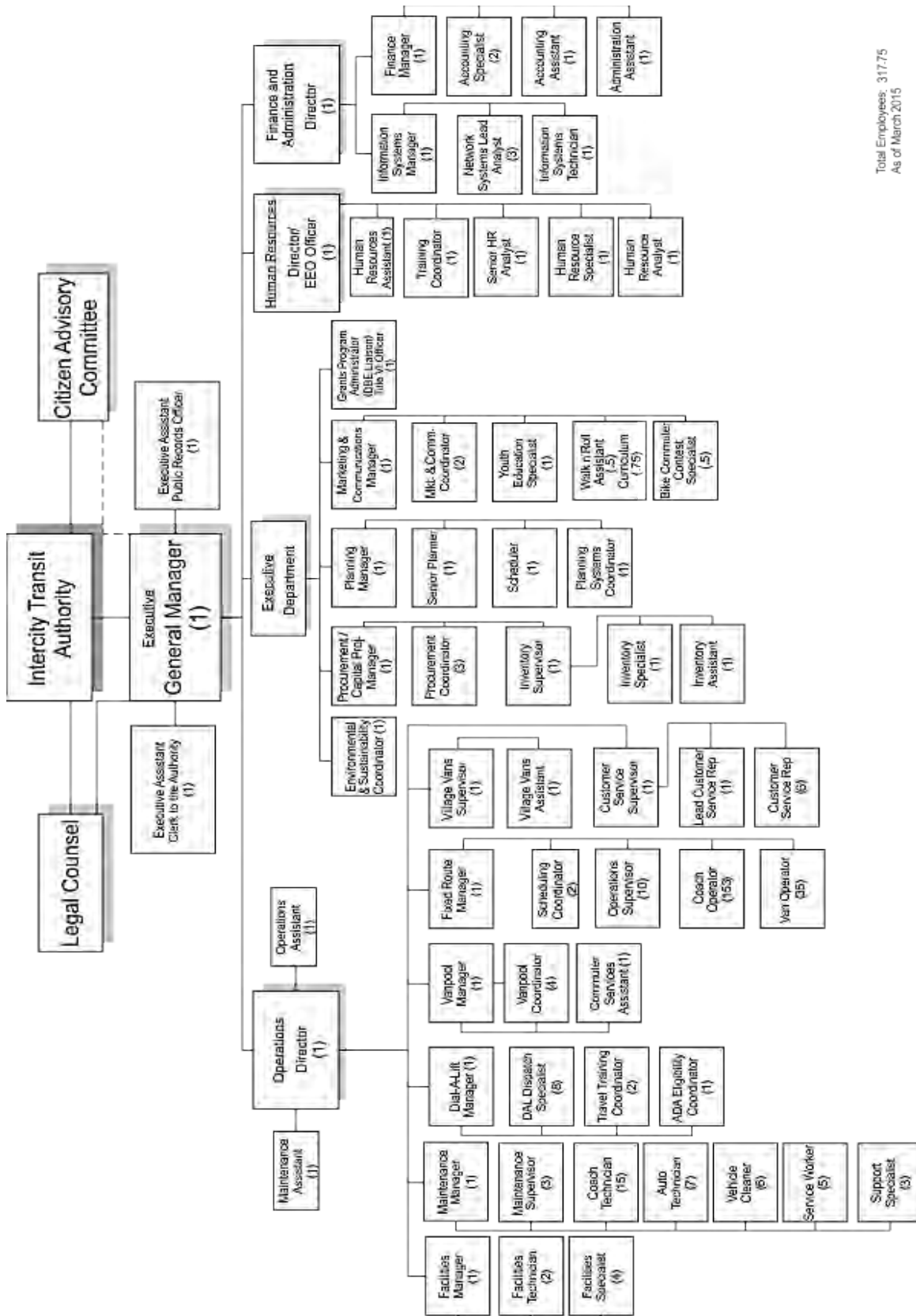
<b>WSDOT Report - 2019</b>	<b>General Fund</b>	<b>Working Capital</b>	<b>Total</b>
<b>Beginning Balance January 1, 2018</b>	<b>\$10,205,102</b>	<b>\$10,375,778</b>	<b>\$20,580,880</b>
<b>Revenues</b>			
Sales Tax	35,126,004		35,126,004
Motor Vehicle Excise Tax			-
Farebox	5,791,768		5,791,768
Sales Tax Equalization			
Federal Operating Grants	4,417,257		4,417,257
State Operating Grants	385,922		385,922
Other	877,118		877,118
Contribution To Accounts	(414,438)	414,438	-
<b>Total Available</b>	<b>\$56,388,733</b>	<b>\$10,790,216</b>	<b>\$67,178,949</b>
<b>Operating Expenses</b>			
Vanpool/Rideshare P&M	3,347,751		3,347,751
Vanpool/Rideshare System Expansion	133,910		133,910
Fixed Route P&M	26,940,225		26,940,225
Fixed Route System Expansion			-
Commuter Bus P&M	2,831,408		2,831,408
Commuter Bus System Expansion			
Paratransit ADA P&M	9,834,475		9,834,475
Paratransit ADA System Expansion	-		-
Rideshare/CTR P&M	-		-
Amtrak Station P&M	73,093		73,093
Annual Depreciation	6,651,144		6,651,144
Contribution To Accounts			-
<b>Total Expenses</b>	<b>\$49,812,007</b>	<b>-</b>	<b>\$49,812,007</b>
<b>Add Back Depreciation</b>	<b>6,651,144</b>		<b>6,651,144</b>
<b>Net Cash Available</b>	<b>\$13,227,870</b>		<b>\$13,227,870</b>
<b>Capital</b>			
<b>Capital Revenue</b>			
Federal Capital Grant - Sec 5307			
Federal Capital Grant - Sec 5309	22,760,237		22,760,237
State Capital Grants	339,239		339,239
<b>Total Capital Revenue</b>	<b>\$23,099,476</b>	<b>-</b>	<b>\$23,099,476</b>
<b>Capital Expenses</b>			
System P&M			
Equipment & Furnishings	2,239,000		2,239,000
Replace Coaches -	5,345,967		5,345,967
Replace Shuttle Vans/Small Coaches			-
Replace DAL Vans -	366,938		366,938
Replace Vanpool Vans -	986,041		986,041
Replace Staff Vehicles	81,930		81,930
Facilities	1,730,000		1,730,000
System Expansion			-
Coach -			-
Shuttle Van - Small Coach			-
DAL Van			-
Vanpool Van	361,548		361,548
Facilities	27,463,203		27,463,203
<b>Total Capital Expenses</b>	<b>\$38,574,627</b>		<b>\$38,574,627</b>
<b>Ending Balance December 31, 2016</b>	<b>(\$2,247,281)</b>	<b>\$10,790,216</b>	<b>\$8,542,935</b>

<b>WSDOT Report - 2020</b>	<b>General Fund</b>	<b>Working Capital</b>	<b>Total</b>
<b>Beginning Balance January 1, 2018</b>	<b>(\$2,247,281)</b>	<b>\$10,790,216</b>	<b>\$8,542,935</b>
<b>Revenues</b>			
Sales Tax	36,179,785		36,179,785
Motor Vehicle Excise Tax			-
Farebox	5,995,042		5,995,042
Sales Tax Equalization			
Federal Operating Grants	4,457,239		4,457,239
State Operating Grants	385,922		385,922
Other	650,201		650,201
Contribution To Accounts	(351,612)	351,612	-
<b>Total Available</b>	<b>\$45,069,296</b>	<b>\$11,141,828</b>	<b>\$56,211,124</b>
<b>Operating Expenses</b>			
Vanpool/Rideshare P&M	3,682,803		3,682,803
Vanpool/Rideshare System Expansion	141,646		141,646
Fixed Route P&M	27,267,938		27,267,938
Fixed Route System Expansion			-
Commuter Bus P&M	2,994,984		2,994,984
Commuter Bus System Expansion			
Paratransit ADA P&M	10,402,628		10,402,628
Paratransit ADA System Expansion	-		-
Rideshare/CTR P&M	-		-
Amtrak Station P&M	77,316		77,316
Annual Depreciation	6,850,678		6,850,678
Contribution To Accounts			-
<b>Total Expenses</b>	<b>\$51,417,992</b>	<b>-</b>	<b>\$51,417,992</b>
<b>Add Back Depreciation</b>	<b>6,850,678</b>		<b>6,850,678</b>
<b>Net Cash Available</b>	<b>\$501,982</b>		<b>\$501,982</b>
<b>Capital</b>			
<b>Capital Revenue</b>			
Federal Capital Grant - Sec 5307			
Federal Capital Grant - Sec 5309	5,008,558		5,008,558
State Capital Grants	349,361		349,361
<b>Total Capital Revenue</b>	<b>\$5,357,919</b>	<b>-</b>	<b>\$5,357,919</b>
<b>Capital Expenses</b>			
System P&M			
Equipment & Furnishings	2,477,500		2,477,500
Replace Coaches -	14,209,222		14,209,222
Replace Shuttle Vans/Small Coaches			-
Replace DAL Vans -	1,729,009		1,729,009
Replace Vanpool Vans -	1,871,008		1,871,008
Replace Staff Vehicles			-
Facilities	100,000		
System Expansion			-
Coach -			-
Shuttle Van - Small Coach			-
DAL Van			-
Vanpool Van	374,202		374,202
Facilities			-
<b>Total Capital Expenses</b>	<b>\$20,760,940</b>		<b>\$20,760,940</b>
<b>Ending Balance December 31, 2016</b>	<b>(\$14,901,039)</b>	<b>\$11,141,828</b>	<b>(\$3,759,211)</b>

## Appendix

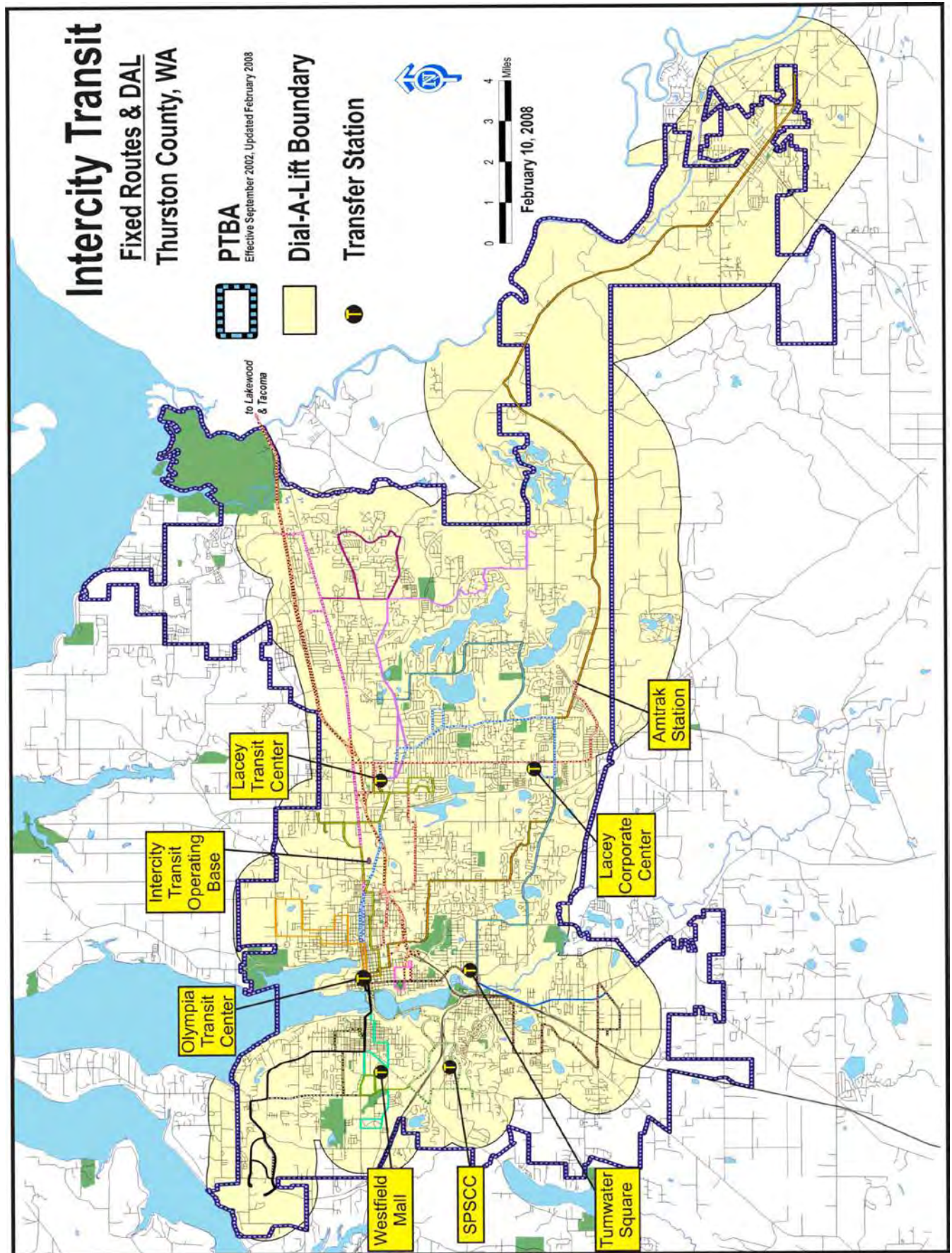
Appendix A:	Organizational Chart
Appendix B:	System Map and Service Boundary Map
Appendix C:	Public Management System (WSDOT forms)
Appendix D:	Operating Data

# Appendix A



Total Employees: 317.75  
As of March 2015





## **Intercity Transit Mission:**

To provide and promote transportation choices that support an accessible, sustainable, livable, healthy and prosperous community.

**Vision:** To be a leading transit system in the country, recognized for our well-trained, highly motivated, customer-focused, community-minded employees committed to enhancing the quality of life for all citizens of Thurston County.

### **Bus Service in 2014**

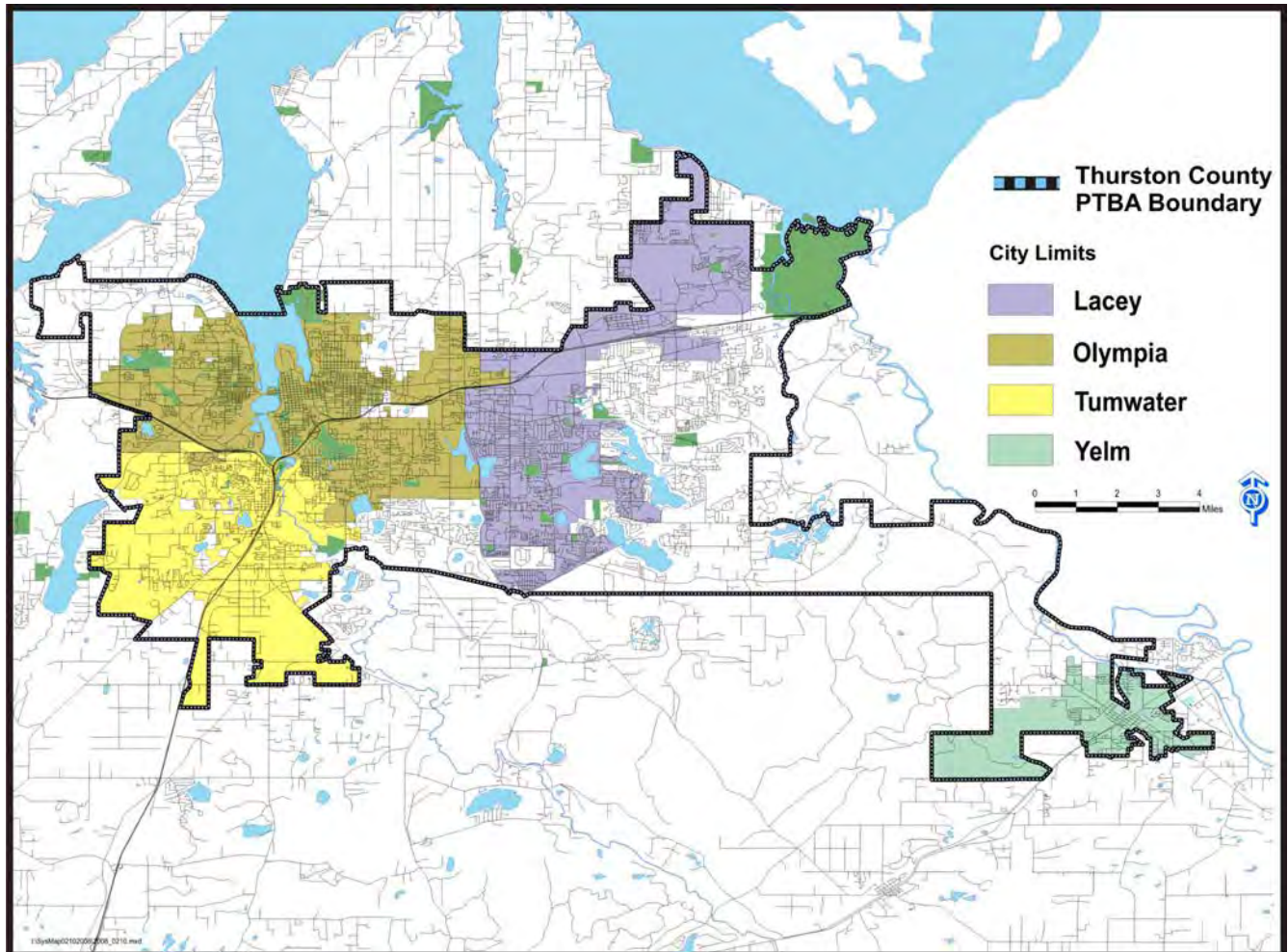
Fixed route service available weekdays on 25 routes, 18 routes operating Saturdays, 15 routes on Sundays. Dial-A-Lift (ADA/paratransit) service available during fixed route service hours. Bus fleet is ADA accessible and all fixed route coaches have two-position bike racks:

- Twenty local routes serving the greater Olympia/Lacey/Tumwater/Yelm area. Connections to Grays Harbor Transit and Mason Transit service (in Olympia) and regional connections to Amtrak and Greyhound service are also available.
- Five inter-county routes provide Express service between Thurston and Pierce Counties with connections to Pierce Transit local service and Sound Transit Express and commuter service in Lakewood and Tacoma. Grant funded contract with Sound Transit for extension of existing route for limited peak trips between Olympia and DuPont with service to Seattle.

### **Intercity Transit Service Boundary**

Approved April 2002, Implemented September 2002,

Updated with City Annexations: 2005 - 2014



Public Management System

I hereby certify that all information reported in this inventory reflects true, accurate and complete information for the agency/organization listed.

Public Transportation Management System  
Owned Rolling Stock Inventory  
Agency/Organization: Intercity Transit  
Date: 1/13/2015

Signature and Title

Year/Make/Model	Vehicle Code	Vehicle Identification Number	Agency Vehicle Number	Current Odometer	Condition (points)	Age Years	Remaining Useful Life (years)	Replacement Cost	ADA Access (yes/no)	Seating Capacity	Fuel Type	WSDOT Title (yes/no)
2008/Eldorado/Aerotech	11	1FD4E45P68DA396644	130	186,320	40	6	1	\$133,000	yes	12	BD	no
2008/Eldorado/Aerotech	11	1FD4E45P88DA396645	131	207,561	40	6	1	\$133,000	yes	12	BD	no
2008/Eldorado/Aerotech	11	1FD4E45PX8DA396646	132	222,682	40	6	1	\$133,000	yes	12	BD	no
2008/Eldorado/Aerotech	11	1FD4E45P18DA396647	133	227,059	40	6	1	\$133,000	yes	12	BD	no
2008/Eldorado/Aerotech	11	1FD4E45P38DA396648	134	184,668	40	6	1	\$133,000	yes	12	BD	no
2009/Eldorado/Aerotech	11	1FD4E45P99DA72356	140	140,821	50	5	2	\$133,000	yes	12	BD	no
2009/Eldorado/Aerotech	11	1FDE45P09DA72357	141	138,096	50	5	2	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL5B1121747	150	79,997	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL9B1121783	151	88,205	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL3B1122279	152	75,530	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL3B1121892	153	99,871	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL7B1122351	154	98,861	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL4B1122307	155	90,770	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL1B1122085	156	75,107	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL0B1124264	157	96,255	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL0B1124202	158	105,057	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL2B1154169	159	93,458	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL9B1154234	160	91,960	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL0B1155269	161	74,958	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL4B1155128	162	76,242	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL9B1156128	163	75,902	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL0B1155076	164	92,493	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL8B1155617	165	85,431	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL2B1155872	166	98,655	70	3	4	\$133,000	yes	12	BD	no
2011/Eldorado/Aerotech	11	1GB6G5BL5B1154781	167	84,624	70	3	4	\$133,000	yes	12	BD	no
2012/Eldorado/Aerotech	11	1GB6G5BL4C1180905	170	42,947	80	2	5	\$133,000	yes	12	BD	no
2012/Eldorado/Aerotech	11	1GB6G5BLXC1181606	171	58,897	80	2	5	\$133,000	yes	12	BD	no
2012/Eldorado/Aerotech	11	1GB6G5BL7C1182857	172	48,656	80	2	5	\$133,000	yes	12	BD	no
2012/Eldorado/Aerotech	11	1GB6G5BL0C1182196	173	57,072	80	2	5	\$133,000	yes	12	BD	no
2012/Eldorado/Aerotech	11	1GB6G5BL9C1182567	174	58,732	80	2	5	\$133,000	yes	12	BD	no
2012/Eldorado/Aerotech	11	1GB6G5BL0C1182585	175	36,859	80	2	5	\$133,000	yes	12	BD	no
2012/Eldorado/Aerotech	11	1GB6G5BL3C1181642	176	35,168	80	2	5	\$133,000	yes	12	BD	no
2012/Eldorado/Aerotech	11	1GB6G5BL6C1181358	177	40,205	80	2	5	\$133,000	yes	12	BD	no
2012/Eldorado/Aerotech	11	1GB6G5BL6C1181926	178	40,210	80	2	5	\$133,000	yes	12	BD	no
2012/Eldorado/Aerotech	11	1GB6G5BL9C1180477	179	39,588	80	2	5	\$133,000	yes	12	BD	no
2010/Gillig Hybrid	10	15GGD3013A1177058	400	232,418	60	4	11	\$630,700	yes	38	DE	no

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37	2010/Gillig Hybrid	10	15GGD3013A1177059	401	226,345	60	4	11	\$630,700	yes	38	DE	no
38	2010/Gillig Hybrid	10	15GGD3013A177060	402	264,403	60	4	11	\$630,700	yes	38	DE	no
39	2010/Gillig Hybrid	10	15GGD3011A177061	403	251,832	60	4	11	\$630,700	yes	38	DE	no
40	2010/Gillig Hybrid	10	15GGD3013A1177062	404	245,166	60	4	11	\$630,700	yes	38	DE	no
41	2010/Gillig Hybrid	10	15GGD3015A1177063	405	269,572	60	4	11	\$630,700	yes	38	DE	no
42	2012 Gillig Hybrid	10	15GGD3014C1180619	410	150,066	80	2	13	\$630,700	yes	38	DE	no
43	2012 Gillig Hybrid	10	15GGD3010C1180620	411	118,381	80	2	13	\$630,700	yes	38	DE	no
44	2012 Gillig Hybrid	10	15GGD3012C1180621	412	136,174	80	2	13	\$630,700	yes	38	DE	no
45	2012 Gillig Hybrid	10	15GGD3014C1180622	413	128,711	80	2	13	\$630,700	yes	38	DE	no
46	2012 Gillig Hybrid	10	15GGD3016C1180623	414	155,793	80	2	13	\$630,700	yes	38	DE	no
47	2012 Gillig Hybrid	10	15GGD3018C1180624	415	132,355	80	2	13	\$630,700	yes	38	DE	no
48	2012 Gillig Hybrid	10	15GGD301XC1180625	416	148,862	80	2	13	\$630,700	yes	38	DE	no
49	2012 Gillig Hybrid	10	15GGD3015E1184391	420	34,880	100	0	15	\$630,700	yes	38	DE	no
50	2014 Gillig Hybrid	10	15GGD3017E1184392	421	32,514	100	0	15	\$630,700	yes	38	DE	no
51	2014 Gillig Hybrid	10	15GGD3019E1184393	422	29,195	100	0	15	\$630,700	yes	38	DE	no
52	2014 Gillig Hybrid	10	15GGD3010E1184394	423	34,854	100	0	15	\$630,700	yes	38	DE	no
53	2014 Gillig Hybrid	10	15GGD3012E1184395	424	35,327	100	0	15	\$630,700	yes	38	DE	no
54	2014 Gillig Hybrid	10	15GGD3014E1184396	425	20,105	100	0	15	\$630,700	yes	38	DE	no
55	2014 Gillig Hybrid	10	15GGD3016E1184397	426	31,379	100	0	15	\$630,700	yes	38	DE	no
56	2014 Gillig Hybrid	10	15GGD3018E1184398	427	29,779	100	0	15	\$630,700	yes	38	DE	no
57	2014 Gillig Hybrid	10	15GGD301XE1184399	428	34,504	100	0	15	\$630,700	yes	38	DE	no
58	2014 Gillig Hybrid	10	15GGD3012E1184400	429	24,524	100	0	15	\$630,700	yes	38	DE	no
59	1998/Gillig/Lowfloor	1	15GGD1811W1070172	903	697,371	0	16	0	\$323,000	yes	38	BD	no
60	1998/Gillig/Lowfloor	1	15GGD1813W1070173	904	749,072	0	16	0	\$323,000	yes	38	BD	no
61	1998/Gillig/Lowfloor	1	15GGD1815W1070174	905	773,206	0	16	0	\$323,000	yes	38	BD	no
62	1998/Gillig/Lowfloor	1	15GGD1817W1070175	906	722,194	0	16	0	\$323,000	yes	38	BD	no
63	1998/Gillig/Lowfloor	1	15GGD1819W1070176	907	743,100	0	16	0	\$323,000	yes	38	BD	no
64	1998/Gillig/Lowfloor	1	15GGD1810W1070177	908	733,365	0	16	0	\$323,000	yes	38	BD	no
65	1998/Gillig/Lowfloor	1	15GGD1814W1070179	910	738,350	0	16	0	\$323,000	yes	38	BD	no
66	1998/Gillig/Lowfloor	1	15GGD1810W1070180	911	820,920	0	16	0	\$323,000	yes	38	BD	no
67	1998/Gillig/Lowfloor	1	15GGD1812W1070181	912	685,372	0	16	0	\$323,000	yes	38	BD	no
68	2004/Gillig/Lowfloor	2	15GGB201241070833	920	503,477	10	10	5	\$323,000	yes	31	BD	no
69	2004/Gillig/Lowfloor	2	15GGB201441070834	921	502,194	10	10	5	\$323,000	yes	31	BD	no
70	2004/Gillig/Lowfloor	2	15GGB201641070835	922	476,463	10	10	5	\$323,000	yes	31	BD	no
71	2004/Gillig/Lowfloor	2	15GGB201841070836	923	480,337	10	10	5	\$323,000	yes	31	BD	no
72	2004/Gillig/Lowfloor	2	15GGB201X41070837	924	415,309	10	10	5	\$323,000	yes	31	BD	no
73	2004/Gillig/Lowfloor	2	15GGB201141070838	925	936,706	10	10	5	\$323,000	yes	31	BD	no
74	2004/Gillig/Lowfloor	2	15GGB201341070839	926	522,225	10	10	5	\$323,000	yes	31	BD	no
75	2004/Gillig/Lowfloor	2	15GGB201131070840	927	507,059	10	10	5	\$323,000	yes	31	BD	no
76	2005/Gillig/Lowfloor	2	15GGB291151075106	930	521,540	10	9	6	\$323,000	yes	32	BD	no
77	2005/Gillig/Lowfloor	2	15GGB291351075107	931	521,752	10	9	6	\$323,000	yes	32	BD	no
78	2005/Gillig/Lowfloor	2	15GGB291551075108	932	543,500	10	9	6	\$323,000	yes	32	BD	no
79	2005/Gillig/Lowfloor	2	15GGV291751075109	933	480,103	10	9	6	\$323,000	yes	32	BD	no

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82	2005/Gillig/Lowfloor	2	15GGB291951075256	934	488,669	10	9	6	\$323,000	yes	32	BD	no
83	2005/Gillig/Lowfloor	2	1555B291951075257	935	563,702	10	9	6	\$323,000	yes	32	BD	no
84	2005/Gillig/Lowfloor	2	15GGB291951075258	936	469,002	10	9	6	\$323,000	yes	32	BD	no
85	2005/Gillig/Lowfloor	2	15GGB291951075259	937	443,412	10	9	6	\$323,000	yes	32	BD	no
86	2005/Gillig/Lowfloor	2	15GGB291651076509	940	444,693	10	9	6	\$323,000	yes	32	BD	no
87	2005/Gillig/Lowfloor	2	15GGB291251076510	941	395,094	10	9	6	\$323,000	yes	32	BD	no
88	2005/Gillig/Lowfloor	2	15GGB291451076511	942	405,257	10	9	6	\$323,000	yes	32	BD	no
89	2005/Gillig/Lowfloor	2	15ggb291651076512	943	379,391	10	9	6	\$323,000	yes	32	BD	no
90	2005/Gillig/Lowfloor	2	15GGB291851076513	944	431,824	10	9	6	\$323,000	yes	32	BD	no
91	2005/Gillig/Lowfloor	3	15GGE291451091095	950	143,085	10	9	6	\$300,000	yes	22	BD	no
92	2005/Gillig/Lowfloor	3	15GGE291651091096	951	166,855	10	9	6	\$300,000	yes	22	BD	no
93	2005/Gillig/Lowfloor	3	15GGE291851091097	952	170,816	10	9	6	\$300,000	yes	22	BD	no
94	2005/Gillig/Lowfloor	3	15GGE291X51091098	953	137,106	10	9	6	\$300,000	yes	22	BD	no
95	2007 Gillig Lowfloor	2	15GGD21871077683	960	370,571	30	7	8	\$323,000	yes	32	BD	no
96	2007 Gillig Lowfloor	2	15GGB271X71077684	961	359,057	30	7	8	\$323,000	yes	32	BD	no
97	2007 Gillig Lowfloor	2	15GGB271171077685	962	365,261	30	7	8	\$323,000	yes	32	BD	no
98	2007 Gillig Lowfloor	2	15GGB271371077686	963	363,580	30	7	8	\$323,000	yes	32	BD	no
99	2007 Gillig Lowfloor	2	15GGB271571077687	964	369,478	30	7	8	\$323,000	yes	32	BD	no
100	2007 Gillig Lowfloor	3	15GGE271471091376	970	179,226	40	6	9	\$300,000	yes	22	BD	no
101	2007 Gillig Lowfloor	3	15GGE271671091377	971	213,894	30	7	8	\$300,000	yes	22	BD	no
102	2007 Gillig Lowfloor	3	15GGE271871091378	972	305,653	30	7	8	\$300,000	yes	22	BD	no
103	2007 Gillig Lowfloor	3	15GGE271X71091379	973	171,245	30	7	8	\$300,000	yes	22	BD	no
104	2007 Gillig Lowfloor	3	15GGE271671091380	974	214,709	30	7	8	\$300,000	yes	22	BD	no
105	2007 Gillig Lowfloor	3	15GGE271871091381	975	178,909	30	7	8	\$300,000	yes	22	BD	no
106	2007 Gillig Lowfloor	3	15GGE271X71091382	976	227,102	30	7	8	\$300,000	yes	22	BD	no
107	2007 Gillig Lowfloor	3	15GGE271171091383	977	245,196	30	7	8	\$300,000	yes	22	BD	no
108	2007 Gillig Lowfloor	2	15GGB271571078385	980	324,925	30	7	8	\$323,000	yes	32	BD	no
109	2007 Gillig Lowfloor	2	15GGB27177078386	981	328,116	30	7	8	\$323,000	yes	32	BD	no
110	2007 Gillig Lowfloor	2	15GGB27191078387	982	344,631	30	7	8	\$323,000	yes	32	BD	no
111	2007 Gillig Lowfloor	2	15GGB271071078388	983	298,776	30	7	8	\$323,000	yes	32	BD	no
112	2007 Gillig Lowfloor	2	15GGB27121078389	984	323,728	30	7	8	\$323,000	yes	32	BD	no
113	2007 Gillig Lowfloor	2	15GGD271671078390	990	419,165	30	7	8	\$323,000	yes	32	BD	no
114	2007 Gillig Lowfloor	2	15GGD271871078391	991	392,355	30	7	8	\$323,000	yes	32	BD	no
115	2007 Gillig Lowfloor	2	15GGD271X71078392	992	392,635	30	7	8	\$323,000	yes	32	BD	no
116	2007 Gillig Lowfloor	2	15GGD271171078393	993	363,589	30	7	8	\$323,000	yes	32	BD	no
117	2007 Gillig Lowfloor	2	15GGD271371078394	994	461,857	30	7	8	\$323,000	yes	32	BD	no
118	2006 Dodge Caravan	13	1D8GP24RX6B637751	1530	98,767	10	8	0	\$22,000	no	7	GA	yes
119	2006 Dodge Caravan	13	1D8GP12R16B637752	1531	104,783	20	7	0	\$22,000	no	7	GA	yes
120	2006 Ford/ Clubwagon	13	1FBNE31L46DA24647	1540	101,268	20	7	0	\$24,320	no	12	GA	yes
121	2006 Ford/ Clubwagon	13	1FBNE31L66DA24651	1542	102,527	20	7	0	\$24,320	no	12	GA	yes
122	2006 Ford/ Clubwagon	13	1FBNE31176DA24643	1547	127,884	20	7	0	\$24,320	no	12	GA	yes
123	2006 Ford/ Clubwagon	13	1FBNE31L96DA24658	1553	94,411	20	7	0	\$24,320	no	12	GA	yes
124	2006 Ford/ Clubwagon	13	1FBNE31L26DA24663	1556	91,567	20	7	0	\$24,320	no	12	GA	yes
125	2006 Ford/ Clubwagon	13	1FBNE31L56DA24639	1557	89,030	20	7	0	\$24,320	no	12	GA	yes
126	2006 Ford/ Clubwagon	13	1FBNE31L16DA24654	1560	100,215	20	7	0	\$24,320	no	12	GA	yes

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127	2006 Ford/ Clubwagon	13	1FBNE31L36DA24655	1568	79,572	20	7	0	\$24,320	no	12	GA	yes
128	2004 Ford E350	14	1FTSE34L54HB35935	1576	37,123	0	10	0	\$48,000	yes	9	GA	no
129	2004/Ford Clubwagon	13	1FBNE31L34HB38595	1775	82,494	0	10	0	\$24,320	no	12	GA	no
130	2005/Ford Clubwagon	13	1FBNE31L85HB38559	1784	73,563	0	9	0	\$24,320	no	12	GA	yes
131	2005/Ford Clubwagon	13	1FBNE31L85HB38562	1786	99,614	0	9	0	\$24,320	no	12	GA	yes
132	2005/Ford Clubwagon	13	1FBNE31L15HB38564	1789	71,415	0	9	0	\$24,320	no	12	GA	no
133	2005/Ford Clubwagon	13	1FBNE31L55HB38566	1791	62,471	0	9	0	\$24,320	no	12	GA	no
134	2008 Chevrolet Uplander	13	1GNDV23W78D205888	1804	142,051	40	6	1	\$24,320	no	12	GA	no
135	2008 Chevrolet Express	13	1GAHG39KX81221687	1805	122,572	40	6	1	\$24,320	no	12	GA	no
136	2012 EV1 ADA	14	523MF1A65CM101163	1807	35,881	80	2	5	\$48,000	yes	4	GA	no
137	2014 Chevy Express	14	1GNWGRFA7E1212784	1806	3,481	100	0	6	\$22,000	yes	4	GA	no
138	2014 Chevy Express	14	1GAWGRFA0E1212854	1808	3,227	100	0	6	\$22,000	yes	4	GA	no
139	2007 Chevy Express	13	1GAHG35U071188737	1820	112,455	30	7	0	\$24,320	no	12	GA	no
140	2007 Chevy Express	13	1GAHG35U171188987	1821	108,016	30	7	0	\$24,320	no	12	GA	no
141	2007 Chevy Express	13	1GAHG35U671189259	1823	102,360	30	7	0	\$24,320	no	12	GA	no
142	2007 Chevy Express	13	1GAHG35U971189143	1825	77,989	30	7	0	\$24,320	no	12	GA	no
143	2007 Chevy Express	13	AGAHG35U971189790	1826	112,647	30	7	0	\$24,320	no	12	GA	no
144	2007 Chevy Express	13	1GAHG35U371189560	1827	102,191	30	7	0	\$24,320	no	12	GA	no
145	2007 Chevy Express	13	1GAHG35U671189603	1830	90,484	30	7	0	\$24,320	no	12	GA	no
146	2007 Chevy Express	14	1GAHG35U971189112	1831	99,051	30	7	0	\$24,320	no	12	GA	no
147	2007 Chevy Express	13	1GAHG35U71189443	1837	102,015	30	7	0	\$24,320	no	12	GA	yes
148	2007 Chevy Express	13	1GAHG35U771190534	1839	104,677	30	7	0	\$24,320	no	12	GA	yes
149	2007 Chevy Express	13	1GAHG35U071190276	1842	89,488	30	7	0	\$24,320	no	12	GA	yes
150	2007 Chevy Express	13	1GAHG35U671191139	1844	96,538	30	7	0	\$24,320	no	12	GA	yes
151	2007 Chevy Express	13	1GAHG35U471190152	1845	94,091	30	7	0	\$24,320	no	12	GA	yes
152	2007 Chevy Express	13	1GAHG35U271190523	1846	89,696	30	7	0	\$24,320	no	12	GA	yes
153	2007 Chevy Express	13	1GAHG35U971191118	1847	69,822	30	7	0	\$24,320	no	12	GA	yes
154	2007 Chevy Express	13	1GAHG35U371188716	1851	123,597	30	7	0	\$24,320	no	12	GA	yes
155	2007 Chevy Express	13	1GAHG35U071189757	1854	93,786	30	7	0	\$24,320	no	12	GA	yes
156	2007 Chevy Express	13	1GAHG35U771189447	1855	99,786	30	7	0	\$24,320	no	12	GA	yes
157	2007 Chevy Express	13	1GAHG35U071190388	1856	116,887	30	7	0	\$24,320	no	12	GA	yes
158	2007 Chevy Express	13	1GAHG35U471191317	1857	82,073	30	7	0	\$24,320	no	12	GA	yes
159	2007 Chevy Express	13	1GAHG35U171190576	1860	101,106	30	7	0	\$24,320	no	12	GA	yes
160	2007 Chevy Express	13	1GAHG35U171189816	1861	107,192	30	7	0	\$24,320	no	12	GA	yes
161	2007 Chevy Express	13	1GAHG35U471239477	1862	91,496	30	7	0	\$24,320	no	12	GA	no
162	2007 Chevy Express	13	1GAHG39U671188977	1870	119,531	30	7	0	\$26,910	no	15	GA	no
163	2008 Chevy Uplander	13	1GNDV23W38D197613	1901	75,210	40	6	0	\$22,000	no	7	GA	no
164	2008 Chevy Uplander	13	1GNDV23WX8D196426	1903	122,057	40	6	0	\$22,000	no	7	GA	yes
165	2008 Chevy Uplander	13	1GNDV23W48D196485	1904	91,219	40	6	0	\$22,000	no	7	GA	no
166	2008 Chevy Uplander	13	1GNDV23W78D196741	1905	81,014	40	6	0	\$22,000	no	7	GA	no
167	2008 Chevy Uplander	13	1GNDV23W38D197621	1906	74,534	40	6	0	\$22,000	no	7	GA	no
168	2008 Chevy Uplander	14	1GNDV23WX8D196491	1907	97,390	40	6	0	\$22,000	no	7	GA	no
169	2008 Chevy Uplander	13	1GNDV23W78D196237	1908	93,747	40	6	0	\$22,000	no	7	GA	no
170	2008 Chevy Uplander	13	1GNDV23W08D208549	1909	68,332	40	6	0	\$22,000	no	7	GA	no

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171	2008 Chevy Uplander	13	1GNDV23W08D208440	1910	64,028	40	6	0	\$22,000	no	7	GA	no
172	2008 Chevy Uplander	13	1GNDV23W98D207917	1911	83,966	40	6	0	\$22,000	no	7	GA	no
173	2008 Chevy Uplander	13	1GNDV23W8D207828	1912	60,968	40	6	0	\$22,000	no	7	GA	no
174	2008 Chevy Uplander	14	1GNDV23W48D207825	1913	105,845	40	6	0	\$22,000	no	7	GA	no
175	2008 Chevy Uplander	13	1GNDV23W88D206547	1915	100,909	40	6	0	\$22,000	no	7	GA	no
176	2008 Chevy Uplander	13	1GNDV23W38D208612	1916	123,303	40	6	0	\$22,000	no	7	GA	no
177	2008 Chevy Uplander	14	1GNDV23W88D208752	1917	115,610	40	6	0	\$22,000	no	7	GA	no
178	2008 Chevy Express	13	1GAHG35K681217707	1920	49,756	40	6	0	\$24,320	no	12	GA	yes
179	2008 Chevy Express	13	1GAHG35K881217711	1921	91,261	40	6	0	\$24,320	no	12	GA	yes
180	2008 Chevy Express	13	1GAHG35K781219854	1923	86,766	40	6	0	\$24,320	no	12	GA	yes
181	2008 Chevy Express	13	1GAHG35K481220248	1924	106,550	40	6	0	\$24,320	no	12	GA	yes
182	2008 Chevy Express	13	1GAHG35K481218340	1925	69,152	40	6	0	\$24,320	no	12	GA	yes
183	2008 Chevy Express	13	1GAHG35K681219148	1926	66,726	40	6	0	\$24,320	no	12	GA	yes
184	2008 Chevy Express	13	1GAHG35K281219132	1927	70,986	40	6	0	\$24,320	no	12	GA	yes
185	2008 Chevy Express	13	1GAHG35KX81220528	1928	46,423	40	6	0	\$24,320	no	12	GA	yes
186	2008 Chevy Express	13	1GAHG35K181220627	1929	49,738	40	6	0	\$24,320	no	12	GA	yes
187	2008 Chevy Express	13	1GAHG35K481220704	1930	57,012	40	6	0	\$24,320	no	12	GA	yes
188	2008 Chevy Express	13	1GAHG35K581219464	1931	108,564	40	6	0	\$24,320	no	12	GA	yes
189	2008 Chevy Express	13	1GAHG35K281218160	1932	132,161	40	6	0	\$24,320	no	12	GA	yes
190	2008 Chevy Express	13	1GAHG35K181221003	1934	119,450	40	6	0	\$24,320	no	12	GA	yes
191	2008 Chevy Express	13	1GAHG35K281218191	1936	114,223	40	6	0	\$24,320	no	12	GA	yes
192	2008 Chevy Express	13	1GAHG35K681220218	1938	128,344	40	6	0	\$24,320	no	12	GA	no
193	2008 Chevy Express	13	1GAHG35K181219459	1939	76,369	40	6	0	\$24,320	no	12	GA	no
194	2008 Chevy Express	13	1GAHG35KX81220822	1942	103,016	40	6	0	\$24,320	no	12	GA	no
195	2008 Chevy Express	13	1GAHG35K381220015	1943	61,195	40	6	0	\$24,320	no	12	GA	no
196	2008 Chevy Express	13	1GAHG35K581220419	1944	60,767	40	6	0	\$24,320	no	12	GA	no
197	2008 Chevy Express	13	1GAHG35KX81233733	1946	79,713	40	6	0	\$24,320	no	12	GA	no
198	2008 Chevy Express	13	1GAHG39K381218971	1950	110,815	40	6	0	\$26,910	no	15	GA	no
199	2008 Chevy Express	13	1GAHG39K981220126	1951	110,814	40	6	0	\$26,910	no	15	GA	no
200	2008 Chevy Express	13	1GAHG39K581218180	1952	121,926	40	6	0	\$26,910	no	15	GA	no
201	2009 Toyota Sienna	13	5TDZK23C19S278371	2000	76,802	50	5	1	\$22,000	no	7	GA	yes
202	2009 Toyota Sienna	13	5TDZK23C49S278378	2001	126,265	50	5	1	\$22,000	no	7	GA	yes
203	2009 Toyota Sienna	13	5TDZK23C19S278872	2002	62,224	50	5	1	\$22,000	no	7	GA	yes
204	2009 Toyota Sienna	13	5TDZK23C19S279232	2003	63,698	50	5	1	\$22,000	no	7	GA	yes
205	2009 Toyota Sienna	13	5TDZK23C39S279666	2004	101,643	50	5	1	\$22,000	no	7	GA	yes
206	2009 Toyota Sienna	13	5TDZK23C29S279206	2005	80,172	50	5	1	\$22,000	no	7	GA	yes
207	2009 Toyota Sienna	13	5TDZK23CX9S278823	2006	82,310	50	5	1	\$22,000	no	7	GA	yes
208	2009 Toyota Sienna	13	5TDZK23C89S280179	2007	107,429	50	5	1	\$22,000	no	7	GA	yes
209	2009 Toyota Sienna	13	5TDZK23C19S280203	2008	77,071	50	5	1	\$22,000	no	7	GA	yes
210	2009 Toyota Sienna	13	5TDZK23C89S279677	2009	66,266	50	5	1	\$22,000	no	7	GA	yes
211	2009 Toyota Sienna	13	5TDZK23C49S282916	2020	112,162	50	5	1	\$22,000	no	7	GA	no
212	2009 Toyota Sienna	13	5TDZK23C69S283145	2021	59,857	50	5	1	\$22,000	no	7	GA	no
213	2009 Toyota Sienna	13	5TDZK23C19S282307	2022	76,135	50	5	1	\$22,000	no	7	GA	no
214	2009 Toyota Sienna	13	5TDZK23C59S282956	2023	37,350	50	5	1	\$22,000	no	7	GA	no
215	2009 Toyota Sienna	13	5TDZK23C99S282328	2024	45,038	50	5	1	\$22,000	no	7	GA	no

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216	2009 Toyota Sienna	13	5TDZK23C79S282635	2025	75,993	50	5	1	\$22,000	no	7	GA	no
217	2009 Toyota Sienna	13	5TDZK23C49S283161	2026	82,089	50	5	1	\$22,000	no	7	GA	no
218	2009 Toyota Sienna	13	5TDZK23C19S283375	2027	66,605	50	5	1	\$22,000	no	7	GA	no
219	2009 Toyota Sienna	13	5TDZK23C19S283389	2028	124,683	50	5	1	\$22,000	no	7	GA	no
220	2009 Toyota Sienna	13	5TDZK23C09S282640	2029	74,858	50	5	1	\$22,000	no	7	GA	no
221	2009 Toyota Sienna	13	5TDZK23C09S282282	2030	75,727	50	5	1	\$22,000	no	7	GA	no
222	2009 Toyota Sienna	13	5TDZK23C79S284997	2031	78,538	50	5	1	\$22,000	no	7	GA	no
223	2009 Toyota Sienna	13	5TDZK23C09S284727	2032	65,359	50	5	1	\$22,000	no	7	GA	no
224	2009 Toyota Sienna	13	5TDZK23C19S285854	2033	68,521	50	5	1	\$22,000	no	7	GA	yes
225	2009 Toyota Sienna	13	5TDZK23C49S286349	2034	83,792	50	5	1	\$22,000	no	7	GA	yes
226	2009 Toyota Sienna	13	5TDZK23C9S286355	2035	134,402	50	5	1	\$22,000	no	7	GA	yes
227	2009 Toyota Sienna	13	5TDZK23C19S286597	2036	51,584	50	5	1	\$22,000	no	7	GA	yes
228	2009 Chevy Express	13	1GAHG35K691156425	2050	107,338	50	5	1	\$24,320	no	12	GA	no
229	2009 Chevy Express	13	1GAHG35K791155459	2051	100,694	50	5	1	\$24,320	no	12	GA	no
230	2009 Chevy Express	13	1GAHG35K591155282	2052	77,470	50	5	1	\$24,320	no	12	GA	no
231	2009 Chevy Express	13	1GAHG35K391156673	2053	53,087	50	5	1	\$24,320	no	12	GA	no
232	2009 Chevy Express	13	1GAHG35K491156657	2054	95,004	50	5	1	\$24,320	no	12	GA	no
233	2009 Chevy Express	13	1GAHG35KX91156010	2055	91,799	50	5	1	\$24,320	no	12	GA	no
234	2009 Chevy Express	13	1GAHG35K191156705	2056	95,571	50	5	1	\$24,320	no	12	GA	no
235	2009 Chevy Express	13	1GAHG35K791156739	2057	74,422	50	5	1	\$24,320	no	12	GA	no
236	2009 Chevy Express	13	1GAHG35K191154713	2058	112,477	50	5	1	\$24,320	no	12	GA	no
237	2009 Chevy Express	13	1GAHG35K591156478	2059	63,478	50	5	1	\$24,320	no	12	GA	no
238	2009 Chevy Express	13	1GAHG35K691156442	2060	49,284	50	5	1	\$24,320	no	12	GA	no
239	2009 Chevy Express	13	1GAHG35K191156607	2061	49,221	50	5	1	\$24,320	no	12	GA	no
240	2009 Chevy Express	13	1GAHG35K291155823	2062	82,051	50	5	1	\$24,320	no	12	GA	no
241	2009 Chevy Express	13	1GAHG35K891166308	2063	56,451	50	5	1	\$24,320	no	12	GA	yes
242	2009 Chevy Express	13	1GAHG35K791166557	2064	102,059	50	5	1	\$24,320	no	12	GA	yes
243	2009 Chevy Express	13	1GAHG39KX91155224	2080	72,072	50	5	1	\$26,910	no	15	GA	no
244	2009 Chevy Express	13	1GAHG39KX91155675	2081	108,226	50	5	1	\$26,910	no	15	GA	no
245	2009 Chevy Express	13	1GAHG39K091156088	2082	112,041	50	5	1	\$26,910	no	15	GA	no
246	2010 Dodge Caravan	13	2D4RN5D15AR356401	2100	61,018	60	4	2	\$22,000	no	7	GA	no
247	2010 Dodge Caravan	13	2D4RN5D17AR356402	2102	50,276	60	4	2	\$22,000	no	7	GA	no
248	2010 Dodge Caravan	13	2D4RN5D10AR356404	2102	84,052	60	4	2	\$22,000	no	7	GA	no
249	2010 Dodge Caravan	13	2D4RN5D13AR356400	2103	96,062	60	4	2	\$22,000	no	7	GA	no
250	2010 Dodge Caravan	13	2D4RN5D19AR356403	2104	34,969	60	4	2	\$22,000	no	7	GA	no
251	2011 Dodge Caravan	13	2D4RN4DG7BR715120	2110	72,667	70	3	3	\$22,000	no	7	GA	yes
252	2011 Dodge Caravan	13	2D4RN4DG1BR715114	2111	98,945	70	3	3	\$22,000	no	7	GA	yes
253	2011 Dodge Caravan	13	2D4RN4DG3BR715115	2112	74,784	70	3	3	\$22,000	no	7	GA	yes
254	2011 Dodge Caravan	13	2D4RN4DG0BR715119	2113	37,575	70	3	3	\$22,000	no	7	GA	yes
255	2011 Dodge Caravan	13	2D4RN4DG8BR715112	2114	32,475	70	3	3	\$22,000	no	7	GA	yes
256	2011 Dodge Caravan	13	2D4RN4DG0BR715122	2115	48,758	70	3	3	\$22,000	no	7	GA	yes
257	2011 Dodge Caravan	13	2D4RN4DH7BR715117	2116	44,034	70	3	3	\$22,000	no	7	GA	yes
258	2011 Dodge Caravan	13	2D4RN4DG9BR715121	2117	24,970	70	3	3	\$22,000	no	7	GA	yes
259	2011 Dodge Caravan	13	2D4RN4DG9BR715118	2118	66,009	70	3	3	\$22,000	no	7	GA	yes
260	2011 Dodge Caravan	13	2D4RN4DG2BR732486	2119	25,079	70	3	3	\$22,000	no	7	GA	yes



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261	2011 Dodge Caravan	13	2D4RN4DGXBR715113	2120	41,165	70	3	3	\$22,000	no	7	GA	yes
262	2011 Dodge Caravan	13	2D4RN4DG5BR715116	2121	35,471	70	3	3	\$22,000	no	7	GA	yes
263	2011 Dodge Caravan	13	2D4RN4DGTBR732497	2122	38,190	70	3	3	\$22,000	no	7	GA	yes
264	2011 Dodge Caravan	13	2D4RN4DG4BR732487	2123	99,638	70	3	3	\$22,000	no	7	GA	yes
265	2011 Dodge Caravan	13	2D4RN4DG6BR732491	2124	29,937	70	3	3	\$22,000	no	7	GA	yes
266	2011 Dodge Caravan	13	2D4RN4DG3BR732495	2125	46,257	70	3	3	\$22,000	no	7	GA	yes
267	2011 Dodge Caravan	13	2D4RN4DGXBR732493	2126	72,230	70	3	3	\$22,000	no	7	GA	yes
268	2011 Dodge Caravan	13	2D4RN4DG5BR732496	2127	60,703	70	3	3	\$22,000	no	7	GA	yes
269	2011 Dodge Caravan	13	2D4RN4DG0BR788801	2128	46,565	70	3	3	\$22,000	no	7	GA	yes
270	2011 Dodge Caravan	13	2D4RN4DG2BR788802	2129	37,265	70	3	3	\$22,000	no	7	GA	yes
271	2011 Dodge Caravan	13	2D4RN4DGXBR788787	2130	41,506	70	3	3	\$22,000	no	7	GA	yes
272	2011 Dodge Caravan	13	2D4RN4DG1BR788788	2131	53,692	70	3	3	\$22,000	no	7	GA	yes
273	2011 Dodge Caravan	13	2D4RN4DG3BR788789	2132	31,496	70	3	3	\$24,320	no	12	GA	yes
274	2011 Ford Econoline	13	1FBNE3BL9BDA90474	2140	47,103	70	3	3	\$24,320	no	12	GA	yes
275	2011 Ford Econoline	13	1FBNE3BL0BDA90475	2141	75,637	70	3	3	\$24,320	no	12	GA	yes
276	2011 Ford Econoline	13	1FBNE3BL4BDA90480	2142	52,716	70	3	3	\$24,320	no	12	GA	yes
277	2011 Ford Econoline	13	1FBNE3BL8BDA90465	2143	85,820	70	3	3	\$24,320	no	12	GA	yes
278	2011 Ford Econoline	13	1FBNE3BL6BDA90464	2144	74,134	70	3	3	\$24,320	no	12	GA	yes
279	2011 Ford Econoline	13	1FBNE3BL5BDA90472	2145	85,745	70	3	3	\$24,320	no	12	GA	yes
280	2011 Ford Econoline	13	1FBNE3BL5BDA90469	2146	74,470	70	3	3	\$24,320	no	12	GA	yes
281	2011 Ford Econoline	13	1FBNE3BL8BDA90482	2147	84,158	70	3	3	\$24,320	no	12	GA	yes
282	2011 Ford Econoline	13	1FBNE3BL7BDA90473	2148	25,375	70	3	3	\$24,320	no	12	GA	yes
283	2011 Ford Econoline	13	1FBNE3BL1BDA90467	2149	64,389	70	3	3	\$24,320	no	12	GA	yes
284	2011 Ford Econoline	13	1FBNE3BL3BDA90471	2150	54,895	70	3	3	\$24,320	no	12	GA	yes
285	2011 Ford Econoline	13	1FBNE3BL4BDA90477	2151	84,685	70	3	3	\$24,320	no	12	GA	yes
286	2011 Ford Econoline	13	1FBNE3BLXBD A90466	2152	101,262	70	3	3	\$24,320	no	12	GA	yes
287	2011 Ford Econoline	13	1FBNE3BL6BDA90478	2153	83,852	70	3	3	\$24,320	no	12	GA	yes
288	2011 Ford Econoline	13	1FBNE3BL6BDA90481	2154	68,016	70	3	3	\$24,320	no	12	GA	yes
289	2011 Ford Econoline	13	1FBNE3BL1BDA90484	2155	84,597	70	3	3	\$24,320	no	12	GA	yes
290	2011 Ford Econoline	13	1FBNE3BL1BDA90470	2156	84,356	70	3	3	\$24,320	no	12	GA	yes
291	2011 Ford Econoline	13	1FBNE3BL8BDA90479	2157	84,356	70	3	3	\$24,320	no	12	GA	yes
292	2011 Ford Econoline	13	1FBNE3BLXBD A90483	2158	96,823	70	3	3	\$24,320	no	12	GA	yes
293	2011 Ford Econoline	13	1FBNE3BL3BDA90468	2159	63,843	70	3	3	\$24,320	no	12	GA	yes
294	2011 Ford Econoline	13	1FBNE3BL2BDA90476	2160	64,668	70	3	3	\$24,320	no	12	GA	yes
295	2011 Ford Econoline	13	1FBSS3BL6BDA90492	2170	52,847	70	3	3	\$26,910	no	15	GA	yes
296	2011 Ford Econoline	13	1FBSS3BLXBD A90494	2171	53,870	70	3	3	\$26,910	no	15	GA	yes
297	2011 Ford Econoline	13	1FBSS3BL8BDA90493	2172	38,786	70	3	3	\$26,910	no	15	GA	yes
298	2012 Dodge Caravan	13	2C4RDGGBGCR281433	2200	32,105	80	2	4	\$22,000	no	7	GA	yes
299	2012 Dodge Caravan	13	2C4RDGGBGCR281442	2201	36,182	80	2	4	\$22,000	no	7	GA	yes
300	2012 Dodge Caravan	13	2C4RDGGBGCR281434	2202	35,430	80	2	4	\$22,000	no	7	GA	yes
301	2012 Dodge Caravan	13	2C4RDGGBG1CR281430	2203	23,925	80	2	4	\$22,000	no	7	GA	yes
302	2012 Dodge Caravan	13	2C4RDGGBG3CR281428	2204	33,034	80	2	4	\$22,000	no	7	GA	yes
303	2012 Dodge Caravan	13	2C4RDGGBG6CR281441	2205	29,624	80	2	4	\$22,000	no	7	GA	yes
304	2012 Dodge Caravan	13	2C4RDGGBG4CR281440	2206	45,252	80	2	4	\$22,000	no	7	GA	yes
305	2012 Dodge Caravan	13	2C4RDGGBG6CR281438	2207	37,688	80	2	4	\$22,000	no	7	GA	yes

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306	2012 Dodge Caravan	13	2C4RDGBG3CR281431	2208	14,410	80	2	4	\$22,000	no	7	GA	yes
307	2012 Dodge Caravan	13	2C4RDGBG2CR281436	2209	19,138	80	2	4	\$22,000	no	7	GA	yes
308	2012 Dodge Caravan	13	2C4RDGBG2CR281426	2210	51,902	80	2	4	\$22,000	no	7	GA	yes
309	2012 Dodge Caravan	13	2C4RDGBG2CR281443	2211	44,000	80	2	4	\$22,000	no	7	GA	yes
310	2012 Dodge Caravan	13	2C4RDGBG2CR281429	2212	30,875	80	2	4	\$22,000	no	7	GA	yes
311	2012 Dodge Caravan	13	2C4RDGBG2CR281439	2213	18,796	80	2	4	\$22,000	no	7	GA	no
312	2012 Dodge Caravan	13	2C4RDGBG2CR281432	2214	45,722	80	2	4	\$22,000	no	7	GA	yes
313	2012 Dodge Caravan	13	2C4RDGBG2CR281437	2215	20,580	80	2	4	\$22,000	no	7	GA	no
314	2012 Dodge Caravan	13	2C4RDGBG2CR281435	2216	42,514	80	2	4	\$22,000	no	7	GA	yes
315	2012 Dodge Caravan	13	2C4RDGBG1CR281427	2217	43,139	80	2	4	\$22,000	no	7	GA	yes
316	2012 Chevy Express	13	1GAZGYFA6C1146340	2220	43,360	80	2	4	\$24,320	no	12	GA	yes
317	2012 Chevy Express	13	1GAZGYFA7C1144945	2221	37,288	80	2	4	\$24,320	no	12	GA	yes
318	2012 Chevy Express	13	1GAZGYFA3C1146532	2222	57,176	80	2	4	\$24,320	no	12	GA	yes
319	2012 Chevy Express	13	1GAZGYFA7C1144735	2223	81,985	80	2	4	\$24,320	no	12	GA	yes
320	2012 Chevy Express	13	1GAZGYFA3C1146028	2224	82,772	80	2	4	\$24,320	no	12	GA	yes
321	2012 Chevy Express	13	1GAZGYFA1C1145220	2225	56,231	80	2	4	\$24,320	no	12	GA	yes
322	2012 Chevy Express	13	1GAZGYFAXC1146530	2226	56,585	80	2	4	\$24,320	no	12	GA	yes
323	2012 Chevy Express	13	1GAZGYFA9C1146681	2227	65,048	80	2	4	\$24,320	no	12	GA	yes
324	2012 Chevy Express	13	1GAZGYFA4C1146264	2228	77,601	80	2	4	\$24,320	no	12	GA	yes
325	2012 Chevy Express	13	1GAZGYFA3C1145056	2229	46,770	80	2	4	\$24,320	no	12	GA	yes
326	2012 Chevy Express	13	1GAZGYFA0C1145239	2230	74,546	80	2	4	\$24,320	no	12	GA	yes
327	2012 Chevy Express	13	1GAZGF1G4C1147166	2240	66,878	80	2	4	\$26,910	no	15	GA	yes
328	2013 Dodge Caravan	13	2C4RDGBG9DR694407	2300	22,149	90	1	5	\$22,000	no	7	GA	no
329	2013 Dodge Caravan	13	2C4RDGBG2DR694402	2301	17,225	90	1	5	\$22,000	no	7	GA	no
330	2013 Dodge Caravan	13	2C4RDGBG4DR694413	2302	27,651	90	1	5	\$22,000	no	7	GA	no
331	2013 Dodge Caravan	13	2C4RDGBG8DR694401	2303	32,992	90	1	5	\$22,000	no	7	GA	no
332	2013 Dodge Caravan	13	2C4RDGBG2DR694409	2304	35,757	90	1	5	\$22,000	no	7	GA	no
333	2013 Dodge Caravan	13	2C4RDGBG0DR694408	2305	14,619	90	1	5	\$22,000	no	7	GA	no
334	2013 Dodge Caravan	13	2C4RDGBG2DR694412	2306	11,740	90	1	5	\$22,000	no	7	GA	no
335	2013 Dodge Caravan	13	2C4RDGBG6DR694400	2307	37,376	90	1	5	\$22,000	no	7	GA	no
336	2013 Dodge Caravan	13	2C4RDGBG1DR694403	2308	29,187	90	1	5	\$22,000	no	7	GA	no
337	2013 Dodge Caravan	13	2C4RDGBG7DR694406	2309	36,508	90	1	5	\$22,000	no	7	GA	no
338	2013 Dodge Caravan	13	2C4RDGBG9DR694405	2310	33,369	90	1	5	\$22,000	no	7	GA	no
339	2013 Dodge Caravan	13	2C4RDGBG0DR694411	2311	10,558	90	1	5	\$22,000	no	7	GA	no
340	2013 Dodge Caravan	13	2C4RDGBG3DR694404	2312	25,355	90	1	5	\$22,000	no	7	GA	no
341	2013 Dodge Caravan	13	2C4RDGBG9DR694410	2313	25,707	90	1	5	\$22,000	no	7	GA	no
342	2013 Ford Econoline	13	1FBNE3BL5DDA71732	2320	19,149	90	1	5	\$24,320	no	12	GA	yes
343	2013 Ford Econoline	13	1FBNE3BL3DDA71731	2321	31,678	90	1	5	\$24,320	no	12	GA	yes
344	2013 Ford Econoline	13	1FBNE3BL1DDA71730	2322	36,599	90	1	5	\$24,320	no	12	GA	yes
345	2013 Ford Econoline	13	1FBNE3BL8DDA71725	2323	32,067	90	1	5	\$24,320	no	12	GA	yes
346	2013 Ford Econoline	13	1FBNE3BLXDDA71726	2324	35,674	90	1	5	\$24,320	no	12	GA	yes
347	2013 Ford Econoline	13	1FBNE3BL5DDA71729	2325	46,773	90	1	5	\$24,320	no	12	GA	yes
348	2013 Ford Econoline	13	1FBNE3BL7DDA71733	2326	16,104	90	1	5	\$24,320	no	12	GA	yes
349	2013 Ford Econoline	13	1FBNE3BL1DDA71727	2327	21,940	90	1	5	\$24,320	no	12	GA	yes
350	2013 Ford Econoline	13	1FBNE3BL3DDA71728	2328	21,444	90	1	5	\$24,320	no	12	GA	yes

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351	2013 Ford Econoline	13	1FBNE3BL1DDA87653	2329	38,445	90	1	5	\$24,320	no	12	GA	no
352	2013 Ford Econoline	13	1FBNE3BL7DDA87656	2330	33,974	90	1	5	\$24,320	no	12	GA	no
353	2013 Ford Econoline	13	1FBNE3BL9DDA87657	2331	38,240	90	1	5	\$24,320	no	12	GA	no
354	2013 Ford Econoline	13	1FBNE3BL2DDA87659	2332	22,854	90	1	5	\$24,320	no	12	GA	no
355	2013 Ford Econoline	13	1FBNE3BL8DDA87648	2333	23,881	90	1	5	\$24,320	no	12	GA	no
356	2013 Ford Econoline	13	1FBNE3BL6DDA87647	2334	24,648	90	1	5	\$24,320	no	12	GA	no
357	2013 Ford Econoline	13	1FBNE3BLXDDA87649	2335	23,920	90	1	5	\$24,320	no	12	GA	no
358	2013 Ford Econoline	13	1FBNE3BL5DDA87655	2336	27,821	90	1	5	\$24,320	no	12	GA	no
359	2013 Ford Econoline	13	1FBNE3BL0DDA87658	2337	28,448	90	1	5	\$24,320	no	12	GA	no
360	2013 Ford Econoline	13	1FBNE3BLXDDA87652	2338	40,006	90	1	5	\$24,320	no	12	GA	no
361	2013 Ford Econoline	13	1FBNE3BL3DDA87654	2339	37,229	90	1	5	\$24,320	no	12	GA	no
364	2013 Ford Econoline	13	1FBNE3BL8DDA87651	2340	33,911	90	1	5	\$24,320	no	12	GA	no
347	2013 Ford Econoline	13	1FBNE3BL6DDA87650	2341	18,965	90	1	5	\$24,320	no	12	GA	no
348	2013 Ford Econoline	13	1FBNE3BL0DDA87644	2342	24,898	90	1	5	\$24,320	no	12	GA	no
349	2013 Ford Econoline	13	1FBNE3BL2DDA87645	2343	19,417	90	1	5	\$24,320	no	12	GA	no
350	2013 Ford Econoline	13	1FBNE3BL4DDA87646	2344	22,103	90	1	5	\$24,320	no	12	GA	no
351	2013 Ford Econoline	13	1BNE3BLE3DDA83667	2345	3,455	90	1	5	\$24,320	no	12	GA	no
352	2013 Ford Econoline	13	1FBNE3BL9DDA87643	2346	23,868	90	1	5	\$24,320	no	12	GA	no
353	2013 Ford Econoline	13	1FBNE3BL0DDA83660	2347	17,214	90	1	5	\$24,320	no	12	GA	no
354	2013 Ford Econoline	13	1FBNE3BL1DDA83666	2348	23,260	90	1	5	\$24,320	no	12	GA	no
355	2013 Ford Econoline	13	1FBNE3BL3DDA83670	2349	9,567	90	1	5	\$24,320	no	12	GA	no
356	2013 Ford Econoline	13	1FBNE3BL8DDA83664	2350	18,620	90	1	5	\$24,320	no	12	GA	no
357	2013 Ford Econoline	13	1FBNE3BL5DDA83668	2351	12,522	90	1	5	\$24,320	no	12	GA	no
358	2013 Ford Econoline	13	1FBNE3BL2DDA83661	2352	44,482	90	1	5	\$24,320	no	12	GA	no
359	2013 Ford Econoline	13	1FBNE3BL5DDA83671	2353	11,134	90	1	5	\$24,320	no	12	GA	no
360	2013 Ford Econoline	13	1FBNE3BL6DDA83663	2354	19,104	90	1	5	\$24,320	no	12	GA	no
361	2013 Ford Econoline	13	1FBNE3BL4DDA83662	2355	15,697	90	1	5	\$24,320	no	12	GA	no
362	2013 Ford Econoline	13	1FBNE3BLXDDA83665	2356	52,157	90	1	5	\$24,320	no	12	GA	no
363	2013 Ford Econoline	13	1FBNE3BL7DDA83669	2357	11,891	90	1	5	\$24,320	no	12	GA	no
364	2103 Chevy Express	13	1GAZG1FA3D1156177	2360	24,247	90	1	5	\$26,910	no	15	GA	yes
365	2103 Chevy Express	13	1GAZG1FA9D1156877	2361	30,997	90	1	5	\$26,910	no	15	GA	yes
366	2103 Chevy Express	13	1GAZG1FA3D1184271	2362	28,282	90	1	5	\$26,910	no	15	GA	no
367	2014 Dodge Caravan	13	2C4RDGCG9ER360245	2400	10,257	100	0	6	\$22,000	no	7	GA	yes
368	2014 Dodge Caravan	13	2C4RDGCG9ER360244	2401	4,139	100	0	6	\$22,000	no	7	GA	yes
369	2014 Dodge Caravan	13	2C4RDGCG9ER360250	2402	3,321	100	0	6	\$22,000	no	7	GA	yes
370	2014 Dodge Caravan	13	2C4RDGCG9ER360242	2403	4,172	100	0	6	\$22,000	no	7	GA	yes
371	2014 Dodge Caravan	13	2C4RDGCG9ER360246	2404	2,379	100	0	6	\$22,000	no	7	GA	yes
372	2014 Dodge Caravan	13	2C4RDGCG9ER360243	2405	1,317	100	0	6	\$22,000	no	7	GA	yes
373	2014 Dodge Caravan	13	2C4RDGCG9ER360241	2406	1,880	100	0	6	\$22,000	no	7	GA	yes
374	2014 Dodge Caravan	13	2C4RDGCG9ER360251	2407	113	100	0	6	\$22,000	no	7	GA	yes
375	2014 Dodge Caravan	13	2C4RDGCG9ER360249	2408	1,562	100	0	6	\$22,000	no	7	GA	yes
376	2014 Dodge Caravan	13	2C4RDGCG9ER360247	2409	0	100	0	6	\$22,000	no	7	GA	yes
377	2014 Dodge Caravan	13	2C4RDGCG9ER360248	2410	0	100	0	6	\$22,000	no	7	GA	yes
378	2014 Chevy Express	13	1GAWGRFA0E1208321	2420	1,106	100	0	6	\$24,320	no	12	GA	no
379	2014 Chevy Express	13	1GAWGRFA6E1208842	2421	933	100	0	6	\$24,320	no	12	GA	no
380	2014 Chevy Express	13	1GAWGRFA8E1208230	2422	1,879	100	0	6	\$24,320	no	12	GA	no

	Year/Make/Model	Vehicle Code	Vehicle Identification Number	Agency Vehicle Number	Current Odometer	Condition (points)	Age Years	Remaining Useful Life (years)	Replacement Cost	ADA Access (yes/no)	Seating Capacity	Fuel Type	WSDOT Title (yes/no)
381	2014 Chevy Express	13	1GAWGRFA3E1208409	2423	389	100	0	6	\$24,320	no	12	GA	no
382	2014 Chevy Express	13	1GAWGRFA6E1208825	2424	2,667	100	0	6	\$24,320	no	12	GA	no
383	2014 Chevy Express	13	1GAWGRFA4E1208385	2425	2,114	100	0	6	\$24,320	no	12	GA	no
384	2014 Chevy Express	13	1GAWGRFA9E1209094	2426	485	100	0	6	\$24,320	no	12	GA	no
385	2014 Chevy Express	13	1GAWGRFA7E1209322	2427	1,033	100	0	6	\$24,320	no	12	GA	no
386	2014 Chevy Express	13	1GAWGRFA6E1208601	2428	90	100	0	6	\$24,320	no	12	GA	no
387	2014 Chevy Express	13	1GAWGRFA7E1208834	2429	76	100	0	6	\$24,320	no	12	GA	no
388	2014 Chevy Express	13	1GAWGRFA2E1208353	2430	1,351	100	0	6	\$24,320	no	12	GA	no
389	2014 Chevy Express	13	1GAWGRFA8E1209667	2431	75	100	0	6	\$24,320	no	12	GA	no
390	2014 Chevy Express	13	1GAWGRFA6E1207884	2432	769	100	0	6	\$24,320	no	12	GA	no
391	2014 Chevy Express	13	1GAWGRFA2E1210376	2433	78	100	0	6	\$24,320	no	12	GA	no
392	2014 Chevy Express	13	1GAWGRFA7E1207838	2434	89	100	0	6	\$24,320	no	12	GA	no
393	2014 Chevy Express	13	1GAWGRFA9E1209791	2435	348	100	0	6	\$24,320	no	12	GA	no
394	2014 Chevy Express	13	1GAWGRFA8E1210401	2436	81	100	0	6	\$24,320	no	12	GA	no
395	2014 Chevy Express	13	1GAWGRFA8E1210253	2437	760	100	0	6	\$24,320	no	12	GA	no
396	2014 Chevy Express	13	1GAWGRFA5E1209299	2438	79	100	0	6	\$24,320	no	12	GA	no
397	2014 Chevy Express	13	1GAWGRFA1E1209610	2439	428	100	0	6	\$24,320	no	12	GA	no
398	2014 Chevy Express	13	1GAWGRFA7E1210194	2440	406	100	0	6	\$24,320	no	12	GA	no
399	2014 Chevy Express	13	1GAWGRFA4E1208175	2441	414	100	0	6	\$24,320	no	12	GA	no
400	2014 Chevy Express	13	1GAWGRFA8E1209183	2442	869	100	0	6	\$24,320	no	12	GA	no
401	2014 Chevy Express	13	1GAWGRFA7E1207747	2443	82	100	0	6	\$24,320	no	12	GA	no
402	2014 Chevy Express	13	1GAWGRFA4E1210119	2444	82	100	0	6	\$24,320	no	12	GA	no
403	2014 Chevy Express	13	1GAWGRFA5E1209755	2445	77	100	0	6	\$24,320	no	12	GA	no
404	2014 Chevy Express	13	1GAWGRFA4E1209892	2446	645	100	0	6	\$24,320	no	12	GA	no
405	2014 Chevy Express	13	1GAWGRFA2E1210393	2447	74	100	0	6	\$24,320	no	12	GA	no
406	2014 Chevy Express	13	1GAWGRFA5E1209738	2448	75	100	0	6	\$24,320	no	12	GA	no
407	2014 Chevy Express	13	1GAWGRFA5E1208105	2449	493	100	0	6	\$24,320	no	12	GA	no
408	2014 Chevy Express	13	1GAWGRFA7E1210433	2450	75	100	0	6	\$24,320	no	12	GA	no
409	2014 Chevy Express	13	1GAWGRFA2E1208014	2451	75	100	0	6	\$24,320	no	12	GA	no
410	2014 Chevy Express	13	1GAWGRFA0E1208397	2452	81	100	0	6	\$24,320	no	12	GA	no
411	2014 Chevy Express	13	1GAZG1FA2E1207783	2460	989	100	0	6	\$26,910	no	15	GA	no
412	2014 Chevy Express	13	1GAZG1FA7E1208938	2461	1,369	100	0	6	\$26,910	no	15	GA	no
413	2014 Chevy Express	13	1GAZG1FA7E1209772	2462	1,031	100	0	6	\$26,910	no	15	GA	no
414	2014 Chevy Express	13	1GAZG1FA0E1209967	2463	80	100	0	6	\$26,910	no	15	GA	no
415	2014 Chevy Express	13	1GAZG1FA5E1210077	2464	1,996	100	0	6	\$26,910	no	15	GA	no
416	2014 Chevy Express	13	1GAZG1FA3E1210496	2465	0	100	0	6	\$26,910	no	15	GA	no

**Public Transportation Management System  
Owned Equipment Inventory**

**Agency/Organization:** Intercity Transit  
**Date:** January 13, 2015

	<b>Equipment Code and Description</b>	<b>Condition</b> (points)	<b>Age</b> (years)	<b>Remaining Useful Life</b> (years)	<b>Replacement Cost</b> (\$)	<b>Comments</b> <i>(If more than two lines, please attach a separate comment page)</i>
1.	Telephone System	67	7	3	\$200,000	Software patches and parts replacements as needed
3.	CAD/AVL	85	7	3	\$6,000,000	Regular software patches
4.	Paratransit Dispatch Software	85	7	3	\$450,000	
5.	Mobile Digital Surveillance System	91	4	5	\$850,000	Camera installation should be included in new bus replacements
6.	Fuel Management System	100	0	10	\$300,000	Installation by late 2012
7.	Bus Wash Systems	87	3	12	\$400,000	
8.	Fixed Route Runcutting & Scheduling Software	70	8	2	\$100,000	Frequent software patches as needed to integrate with AVL system
9.	Inventory & Accounting Software	92	7	3	\$750,000	last major upgrade 7 years ago. freq minor upgrades
10.	Digital Voice Recording System	40	7	3	\$100,000	Feature of on-bus announcement system with CAD/AVL system

**Public Transportation Management System  
Owned Facility Inventory**

**Agency/Organization:** Intercity Transit

**Date:** January 13, 2015

	<b>Facility Code</b>	<b>Facility Name</b>	<b>Condition</b> (points)	<b>Age</b> (years)	<b>Remaining Useful Life</b> (years)	<b>Replacement Cost</b> (\$)	<b>Comments</b> <i>(if more than two lines, please attach a separate comment page)</i>
1.	23	Administration Building	55	30	19	\$3,500,000	
2.	11	Maintenance Building	52	30	19	\$10,500,000	
3.	6	Olympia Transit Center	66	21	28	\$7,000,000	
4.	6	Lacey Transit Center	72	19	30	\$1,500,000	
5.	24	Amtrak Depot	70	22	16	\$2,000,000	
6.	9	Martin Way Park and Ride	88	31	34	\$1,000,000	Owned by WSDOT. Lot/capacity redesigned & doubled in 2009
7.	9	Hawks Prairie Park and Ride	97	2	38	\$1,500,000	

Appendix D  
**Operating Data**

**2014 Summary of Fixed Route Services**

Route	Headways					Revenue Service Hours			Revenue Service Miles		
	Weekday			Sat	Sun	Wkdy	Sat	Sun	Wkdy	Sat	Sun
	Peak	Mid	Night								
12-W. Tumwater	30	60	60	60	60	6507	740	653	90,576	9,281	9,186
13-E. Tumwater	15	15	60	60	60	13,366	651	633	149,889	7,071	7,386
21-N. Bethel	30	60		60	60	2,593	303	321	33,201	3,528	4,115
41-TESC	15	30	30	30	30	10,221	1,580	1,281	130,385	18,245	16,333
42-Family Court	25	25				1,530			16,065		
43-SPSCC/Tumwater	30	30		60		6,847	543		86,190	6,465	
44-SPSCC/Cap. Mall	30	30	30	30	60	8,135	1,395	655	102,026	15,999	8,2573
45-Conger/Cap. Mall	30	60		60		3,783	598		37,970	4,816	
47-Capital Mall/CMC	30	30		60	60	6,932	602	637	67,575	5,464	6,371
48-Capital Mall/TESC	30	30	30	30		7,820	1,395		105,137	17,017	
49-Capital Mall					30			623			6,474
60-Lilly/Panorama	30	60		60	60	7,183	888	903	72,777	8,459	9,461
62A-Martin/Meridian	30	30	60	30	60	11,042	1,629	993	134,589	18,390	13,593
62B-Martin/Meadows	30	30	60	30	60	11,921	1,867	985	151,011	21,856	13,883
64-College/Amtrak	30	60		60	60	10,710	1,289	1,257	121,916	13,345	14,286
66-Ruddell	30	30	60	30	30	11,985	2,081	1,957	152,261	24,278	24,819
67-Tri-Lakes	60	60		60		3,421	559		52,020	7,862	
68-Carpenter/Yelm Hwy	30	60		60	60	10,136	1,235	1,306	159,477	17,324	20,172
94-Yelm	30/ 60	30/ 60		60/ 75	135	11,309	1,250	708	210,758	23,328	14,679
101-Dash	12/ 15	12/ 15		10		6,290	348	0	51,239	2,041	0
411-Nightline			60	60	60	130	123	99	1,785	1,450	1,350
*ST592-Oly/DuPont (Sea)	6 AM/ 6 PM					1,862			93,330		
603-Olympia/Tacoma	30	90				6,311			174,967		
605-Olympia/Tacoma	30	90				6,333			137,796		
*609-Tumwater/Lkwd	30	90				6,133			157,629		
612-Lacey/Tacoma	1 AM/ 1 PM					672			14,796		
620-Oly/Tacoma Mall				60/ 90	60/ 90		1,140	1,205		28,314	29,948
<b>System Totals</b>						<b>173,169</b>	<b>20,217</b>	<b>14,217</b>	<b>2,505,361</b>	<b>254,532</b>	<b>200,326</b>
<b>2014 Totals</b>						<b>207,603</b>			<b>2,960,219</b>		

\* WSDOT "Regional Mobility Grant:" funded through June 2017 (approved by State Legislative process)

## 2014 Route Service Summary

Route	Total Boardings	Revenue Hours	Board / Hour	Rating	Comments
<b>Trunk Routes</b>					
13-E. Tumwater	364,722	14,651	24.9	Marginal	
41-TESC	525,622	13,082	40.2	Exceeds	
44-SPSCC/Cap. Mall	275,946	10,185	27.1	Satisfactory	
48-Capital Mall/TESC	359,374	9,215	39.0	Satisfactory	Runs weekday & Saturday.
49-Capital Mall	25,472	623	40.9	Exceeds	Runs Sunday only.
62A-Martin/Meridian	400,212	13,664	29.3	Satisfactory	
62B-Martin/Meadows	375,850	14,773	25.4	Satisfactory	
66-Ruddell	335,196	16,023	20.9	Marginal	
<b>Secondary Routes</b>					
12-W. Tumwater	128,226	7,900	16.2	Satisfactory	
21-N. Bethel	80,135	3,217	24.9	Satisfactory	
43-Barnes Blvd	191,846	7,390	26.0	Exceeds	
45-Conger/Cap. Mall	49,118	4,381	11.2	Marginal	
47-Capital Mall/CMC	212,428	8,171	26.0	Exceeds	
60-Lilly/Panorama	139,004	8,974	15.5	Satisfactory	
64-College/Amtrak	218,118	13,256	16.5	Satisfactory	
67-Tri Lake	43,152	3,980	10.8	Marginal	
68-Carpenter/Boulevard	230,635	12,678	18.2	Satisfactory	
94-Yelm	207,446	13,267	15.6	Satisfactory	
<b>Specialized &amp; Shuttle Routes</b>					
42-Family Court	6,641	1,530	4.3	Unsatisfactory	Limited service. Runs only weekdays during AM/Noon/PM peak.
101-Dash	76,491	6,637.9	12.2	Marginal	Productivity: Session 15.0, Non-session 11.5, Saturdays 11.3
411-Nightline	12,269	352	34.9	Exceeds	Operates Fri/Sat/Sun late night during academic year (under contract).
<b>Express Routes</b>					
			<b>Per Trip</b>		
603-Olympia/Tacoma	63,015	6,311	14.5	Marginal	Runs Weekdays only.
605-Olympia/Tacoma	88,909	6,333	19.4	Satisfactory	Runs Weekdays only.
609-Tumwater/Lkwd	26,606	6,133	5.0	Unsatisfactory	Runs Weekdays only. Grant-funded.
612-Lacey/Tacoma	9,083	672	17.8	Satisfactory	Runs Weekdays only.
620-Oly/Tacoma Mall	24,808	2,345	12.9	Marginal	Runs Sat/Sun only.
ST 592-Oly/DuPont(Sea)	22,758	1,862	7.4	Unsatisfactory	Weekdays only. Operated by ST. Grant-funded.
<b>EXPRESS TOTALS</b>	<b>235,179</b>	<b>24,298</b>	<b>11.9</b>	<b>Marginal</b>	
<b>Fixed Route Totals</b>	<b>4,493,082</b>	<b>207,603</b>	<b>21.6</b>	Change from 2013: Boardings increased 0.8%, Hours up 2.2%, Boardings per Hour down 1.8%.	

<b>Other Intercity Transit Services</b>					
Dial-A-Lift Service	154,357	--	--	2.8 % increase from 2013	
Vanpools	743,869	--	--	2.4 % decrease from 2013	

<b>System Total</b>	<b>5,393,979</b>			0.79% increase from 2013's 5,351,548 Boardings.	
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### Performance Standard

	Standard	Trunk	Primary	Secondary	Rural	Commuter	Express
Riders per Hour						Riders per Trip	
Exceeds standard	>40	>30	>25	>20	>20	25 or more	25 or more
Satisfactory	25-40	20-30	15-25	12-20	12-20	15.0 to 24.9	15.0 to 24.9
Marginal	20-24	15-19	10-14	9-11	9-11	10.0 to 14.9	10.0 to 14.9
Unsatisfactory	<20	<15	<10	<9	<9	Less than 10	Less than 10



## 2014 Vehicle Assignment Analysis

Route	High Load*	Interlined Routes	Vehicle Assigned**	Comments
<b>Trunk Routes</b>				
13-E. Tumwater	76	12,41,45,64,66	Large Bus	Runs Mon-Sun.
41-TESC	78	13	Large Bus	Runs Mon-Sun.
44-SPSCC/Cap. Mall	73	62A, 62B	Large Bus	Runs Mon-Sun.
48-Capital Mall/TESC	79	66, 94	Large Bus	Runs Mon-Sat.
49-Capital Mall	84	66	Large Bus	Runs Sunday.
62A-Martin/Meridian	77	43, 44, 62B	Large Bus	Runs Mon-Sun.
62B-Martin/Meadows	79	43, 44, 62A	Large Bus	Runs Mon-Sun.
66-Ruddell Road	61	13, 48, 49	Large Bus	Runs Mon-Sun.
<b>Secondary Routes</b>				
12-W. Tumwater	61	13, 45, 64	Medium Bus	Runs Mon-Sun.
21-N. Bethel	51	47, 60	Small Bus	Runs Mon-Sun.
43-SPSCC/Barnes	54	62A, 62B	Large Bus	Runs Mon-Sat.
45-Conger/Cap. Mall	53	12, 13	Medium Bus	Runs Mon-Sat.
47-Capital Mall/CMC	65	21, 68	Medium Bus	Runs Mon-Sun.
60-Lilly/Panorama	49	21, 47	Small Bus	Runs Mon-Sun.
64-College/Amtrak	51	12, 13	Medium Bus	Runs Mon-Sun.
67-Tri Lake	35	None	Small Bus	Runs Mon-Sat.
68-Carpenter/Boulevard	69	47	Medium Bus	Runs Mon-Sun.
94-Yelm	54	48	Large Bus	Runs Mon-Sun.
<b>Specialized &amp; Shuttle Routes</b>				
42-Family Court	13	None	Small Bus	Runs weekdays during commute hours and noon period.
101-Dash	41	None	Small Bus	Weekdays: Runs all year. Saturdays: Runs Apr-Sep.
411-Nightline	71	None	Large Bus	Runs Fri/Sat/Sun late night during TESC class quarters, by contract.
<b>Express Routes</b>				
603-Olympia/Tacoma	70	605	Large Bus	Runs weekdays only.
605-Olympia/Tacoma	78	603, 612	Large Bus	Runs weekdays only.
609-Tumwater/Lkwd	29	None	Large Bus	Runs weekdays only.
612-Lacey/Tacoma	43	605	Large Bus	Runs weekdays only.
620-Oly/Tacoma Mall	49	None	Large Bus	Runs weekends only.

\* High Load: Based on APC data provides highest passenger load by route during 2014 (not average trip load).

\*\* Recommended Vehicle Assignment:

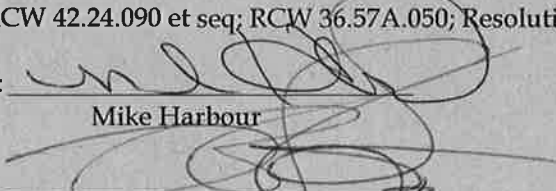
Large Bus: Low Floor 40' - Seating Capacity: 38

Medium Bus: Low Floor 35' - Seating Capacity: 32

Small Bus: Low Floor 30' - Seating Capacity Av: 23

## POLICY-FA-2502

See Also: RCW 42.24.090 et seq; RCW 36.57A.050; Resolution 01-2001

Approved by: 

Mike Harbour

Director of Finance and Administration

Written by: Leslie Williamson

### AUTHORIZING AND REIMBURSING TRAVEL EXPENSES

#### Definitions for purposes of this policy only:

“Employees” - people working for Intercity Transit, the Intercity Transit Authority members, Citizen Advisory Committee members, and other persons approved by the General Manager.

“CBC Expenses” - Director or designee must specifically approve expenses on a case-by-case basis.

“Credit card due date” - the 26<sup>th</sup> day of each month.

“Event” - any training, conference, meeting, class or other activity requiring travel.

“Evidence” - conference agendas, brochures describing the event, transportation tickets, hotel bills, receipts and other supporting documents.

“Certification” - a written statement describing the expense and explaining why a receipt is not available, signed by the employee traveling.

“Daily meal allowance” - pre-determined reimbursement amount for meals as established by the Internal Revenue Service (IRS). This amount includes tips.

“Direct flight” - flight combining low cost **AND** the least amount of time spent traveling and is approved by the employee’s Director or designee.

Examples:

- approval for a \$300 flight requiring a 1-hour layover over a \$200 flight requiring a 4-hour layover.
- denial for a \$2,500, 3-hour flight over an \$800, 9-hour flight.

This policy applies to Intercity Transit “employees” traveling on official Intercity Transit business.

## **POLICY-FA-2502**

### **1. Director or Designee Approves All Travel In Advance**

An "employee's" Director or designee will approve travel and/or advance travel funds using Travel Form (FORM-FA-2502-A), as long as all requirements of this policy and laws are met. Employees must submit advance travel fund requests to Finance within at least five working days of travel date.

### **2. Employees Use Prudent Judgment Incurring Expenses**

Director will **NOT** approve personal, unnecessary or excessive travel reimbursements. Employees must pay for unapproved expenses. See examples on FORM-FA-2502-B, Schedule of Reasonable/Necessary/"CBC Expenses."

### **3. Employees Must Record Travel Expenses Incurred on the Travel Form**

Employees must use FORM-FA-2502-A, Travel Form, to record all expenses incurred relating to the respective travel.

### **4. Employees Submit Completed Travel Forms**

Employees must submit a completed Travel Form to the Finance Division (PROCEDURE-FA-2502-B) following their return from the authorized travel within seven days after the travel period.

If employees fail to submit a form within seven days following the close of the authorized travel period, Intercity Transit may deny future travel and/or travel advances. Failure to reimburse Intercity Transit for unused advance travel funds within this same designated time period shall result in the amounts due plus 10% interest per annum being deducted from an employee's paycheck.

Employees must attach all "evidence" or "certification" of all travel expenses, including conference agendas, transportation receipts, lost receipt certification, etc. to the Travel Form (PROCEDURE-FA-2502-B).

If employees pay any registration or travel costs with the Intercity Transit credit card, the employees will pay those charges by the credit card due date. Employees must submit evidence of these charges to Finance before the credit card due date, even if travel has NOT yet occurred. Employees must also

## POLICY-FA-2502

submit copies of the same documentation with the Travel Form upon completion of travel.

### 5. Intercity Transit Pays for Transportation

**Airfare:** Intercity Transit will pay for the least expensive "direct flight" available. Intercity Transit may pay for alternative modes of travel at the actual cost or airfare cost, whichever is lower, subject to the approval of the General Manager or Director of Finance and Administration. The employee must submit documentation of the difference with the Travel Form. Employee must obtain documentation of airfare within 30 days of departure date.

Employees shall pay for any fees incurred for changing flight times. The General Manager may approve exceptions on a case-by-case basis.

Employees may combine official travel with personal travel. If the personal travel costs are more than the official travel costs, the employee must pay the difference. The employee must submit documentation of the difference with the Travel Form. Employee must obtain documentation of both costs on the date of purchase.

When making travel arrangements, employees will NOT use an Intercity Transit credit card to pay for airfare for non-employees.

**Staff cars:** Employees may use staff cars for official travel, preferably when more than one employee travels to the same destination. Employees may NOT leave a staff car at the airport, unless several employees travel together or a personal situation necessitates use of a staff vehicle. When deciding to use a staff car versus a personal car, employees should consider the minimal impact on the agency.

When parking at the airport, Employees shall use offsite parking.

**Personal automobiles:** Intercity Transit will reimburse at the current IRS mileage reimbursement rate for the use of personal vehicles when used for Intercity Transit purposes. Employees will carpool when two or more people are traveling to and from the same location at the same time. If an employee chooses not to carpool, their Director must give prior approval for reimbursement.

## POLICY-FA-2502

**Rental cars:** If a rental car is necessary, Intercity Transit will pay for the cost of the most economical, acceptable vehicle. If an employee chooses to rent a more expensive vehicle, the employee will pay the additional cost. Employees must submit documentation of the difference with the Travel Form. The employee must obtain documentation of both costs on the date of reservation.

Intercity Transit will NOT pay for an extra driver of the rental car.

Employee will NOT purchase any of the rental car agency's additional insurance coverage, as Intercity Transit's insurance carrier completely covers the car rental. However, if the employee extends the car rental for personal reasons, the employee will need to acquire personal insurance or rely on their own auto insurance, as Intercity Transit insurance will NOT cover personal use.

Employees will NOT use the pre-pay option or the rental car agency refueling to pay for the gas for a rental car. Employees will fuel the rental car before returning it.

### 6. Intercity Transit Pays For Lodging

Intercity Transit will pay for lodging when an employee travels over forty miles from the Pattison Street facility or their home, whichever is closest to the destination.

Intercity Transit will NOT pay for lodging on the last day of an "event" except when

- Travel becomes unreasonably late, as determined by the Director's discretion;
- Airline flights are NOT available for that evening; or
- An overnight stay will result in discounted airfare, with airfare savings exceeding the additional cost for lodging, meals and other expenses.

Employee will submit documentation for the difference between the cost of leaving on the last day of an event and leaving the next day with the Travel Form. Employee will submit documentation of both costs on the date of purchase.

### 7. Intercity Transit Pays For Meals

Intercity Transit will pay for meals at the current IRS established "daily meal allowance" rate. Employees will receive reimbursement for breakfast each

## POLICY-FA-2502

day when traveling before 6:30 AM, and for dinner when traveling after 6:30 PM.

When a conference or class registration includes meal(s), Intercity Transit will NOT reimburse employees for those meals. Employee will submit documentation for meals included with a conference with the Travel Form.

Employees will receive reimbursement for meals only when traveling outside Thurston County. However, Intercity Transit will reimburse employees for meals purchased while participating in and conducting business for Intercity Transit in the following organizations:

- Olympia Thurston Chamber of Commerce
- Lacey Chamber of Commerce
- Tumwater Chamber of Commerce
- South County Chamber of Commerce
- Yelm Chamber of Commerce
- Tenino Chamber of Commerce
- Economic Development Conference
- Olympia Downtown Association
- Morningside and
- Washington State Transit Association

Other organizations may be included with the approval of the General Manager.

Employees will NOT charge meal expenses on Intercity Transit Corporate credit cards, with the exception of meals charged at the above organizations.

Intercity Transit may pay for meals provided to volunteers who perform a service for Intercity Transit and for meals provided to employees involved with these volunteer activities.

### **8. Intercity Transit Provides Communication**

Intercity Transit will provide internet communication devices on a first-come, first-serve basis for employees while traveling. Employees can check out from the Information Systems division wireless internet devices and laptops for use while traveling. If the devices are NOT available, employees may use their own. Intercity Transit will pay for internet access fees on a case-by-case basis if necessary conduct Intercity Transit business.

## **POLICY-FA-2502**

### **9. Intercity Transit Pays for Other Travel Related Expenses**

Intercity Transit will pay for other travel expenses as described in FORM-FA-2502-B.

### **10. Intercity Transit Pays Employees While Traveling**

#### **Non-Exempt:**

**Daily Travel – Intercity Transit** will pay non-exempt employees for all travel time, except meal periods, when the employee rides as a passenger or serves as the driver.

Example: An employee travels to Portland for training. The trip takes two hours each way and the training is from 8:30 am to 5:00 pm with an hour lunch break. The employee will receive pay for:

- Two hours travel to Portland (2 hours pay)
- Training time, less lunch break (7.5 hours pay)
- Two hours travel from Portland (2 hours pay)
- Total pay: 11.5 hours

**Overnight Travel -** Employees will NOT receive pay when traveling as a passenger outside of their regular working hours. Intercity Transit will pay employees if they drive outside of regular working hours.

Example: An employee's regular working hours: 8:00 am to 4:30 pm. The employee leaves for a conference at 1:30 pm, and travels to SeaTac airport, arriving at 3:00. The employee then flies to their destination, and receives pay for 8.0 hours. Travel during non-work hours considered work time if the employee actually performs work, so employees receives pay while driving.

#### **Exempt:**

Intercity Transit will pay exempt employees for regular working hours only.


### **11. General Manager Must Approve Policy Exceptions**

### **12. Employee May Lose Travel Privileges**

Failure to comply with Policy-FA-2502 may result in the loss of the employee travel card or travel privileges, at the Finance Director's discretion.

## PROCEDURE-FA-2502-A

See Also: Policy-FA-2502

Approved by:   
Director of Finance & Administration

Written by: Leslie Williamson

### COMPLETING TRAVEL FORM FOR PRE-APPROVAL

**Action By:**

**Action:**

Employee

1. **Identifies** training/travel opportunity.
2. **Completes** Part I, Pretrip Authorization, Numbers 1, 2, and 3, FORM-FA-2502-A (Travel Form).
  - 2a. If Employee wants advance travel funds, using Part IV, Meal Calculation, on the back of the travel form, **estimates** cash requirements and **completes** Part I, Number 4.

Director -  
OR-  
Designee  
(Director)

3. **Submits** form to Director for review and approval.
4. **Reviews** form, and **approves** the form by signing Part I, Number 6.
5. **Returns** form to employee.
  - 5a. If denies travel request, **returns** form to employee with explanation.
  - 5b. If identifies incomplete form, returns to employee for completion.

Employee

6. **Receives** approved travel form from Director.
  - 6a. If requesting credit card(s) and/or advance travel funds, **submits** approved form to Finance at least five working days before travel date.
  - 6b. If incomplete form, **returns** to Steps 2 and 3.

Finance

7. **Reviews** approved travel form requesting advance travel



## PROCEDURE-FA-2502-A

funds and/or credit card(s).

7a. **Prepares** advance travel check and/or **assigns** credit cards.

7b. **Completes** Part I, Number 7.

8. **Notifies** employee to pick up advance travel funds and/or credit card.

Employee

9. **Picks up** advance travel check and/or credit card, **initials** and **dates** travel form.

10. **Retains** travel form until after completion of travel (See PROCEDURE-FA-2502-B).

## PROCEDURE-FA-2502-B

See Also: Policy-FA-2502

Approved by:   
Director of Finance & Administration

Written by: Leslie Williamson

### COMPLETING AND AUDITING FORM AFTER TRAVEL

#### **Definitions:**

“evidence” - brochures describing the event, transportation tickets, hotel bills, receipts, and other supporting documents.

“certification” - a statement describing the expense and explaining why a receipt is not available, signed by the employee traveling.

#### **Action By:**

Employee

#### **Action:**

1. **Reviews** FORM-FA-2502-A, Part IV, Meal Calculation, and makes any necessary changes.
2. **Enters** totals from Part IV into Part II, Travel Expenses, Line 1 of FORM-FA-2502-A.
3. **Completes** Part II, Sections A, B, and C of FORM-FA-2502-A.
4. **Attaches** to FORM-FA-2502-A “evidence” and “certification” of all travel expenses, including conference agendas, transportation receipts, lost receipts form, etc.
5. **Completes** Part III, Numbers 1 and 2.
6. **Submits** form to Accounting for audit.
7. **Audits** documents and **completes** Part III, Numbers 7 and 8.
  - 7a. If corrections are necessary, **discusses** changes with employee.
  - 7b. **Returns** form to employee.
8. If reimbursement is due employee, **completes** a Purchase Order form.
9. If reimbursement is due Intercity Transit, **attaches** payment to travel form.

## PROCEDURE-FA-2502-B

See Also: Policy-FA-2502

Approved by: \_\_\_\_\_  
Director of Finance & Administration

Written by: Leslie Williamson

10. **Submits** form(s) to Director or designee for approval.
- Director –  
OR-  
Designee
11. **Reviews** documents for completion and accuracy.
  - 11a. If documents are incomplete or inaccurate, **returns** them to employee.
12. **Completes** Part III, Numbers 3, 4, 5 and 6.
13. **Submits** form(s) to Accounting.
- Accounting
14. If reimbursement is due employee, **processes** Accounts Payable check and **distributes** check to employee.
15. If reimbursement due Intercity Transit, **completes** Treasurer's receipt and deposits reimbursement.
16. **Distributes** forms to appropriate files.

**INTERCITY TRANSIT TRAVEL FORM**

**I. Pre-Trip Authorization:**

1. Name: \_\_\_\_\_ Event: \_\_\_\_\_
2. Destination: \_\_\_\_\_ Departure Date: \_\_\_\_\_ Return Date: \_\_\_\_\_
3. Estimated Total Cost of Travel (registration, airfare, lodging, meals, car etc.) Total: \_\_\_\_\_
4. Advance Travel Request Amount \$ \_\_\_\_\_ **-- Event Agenda must be Attached--**
5. Mode(s) of travel to be used: \_\_\_\_\_ 6. Using a Staff Car? Y / N
7. Approved by: \_\_\_\_\_ Director or designee
8. Advance Travel Granted is: Cash Y / N or Check # \_\_\_\_\_ Initial: \_\_\_\_\_ Date: \_\_\_\_\_

**II. Travel Expenses:** All EXPENSES MUST HAVE matching Receipts attached (EXCEPT MEALS).

<u>SECTION A</u>	IT PAID THRU A/P	IT CREDIT CARDS	EMPLOYEE Per Diem, Expenses Paid, \$\$ Owing to IT
1. Meals (from IV. Meal Calculation worksheet):			\$
2. Airline Travel:		\$	\$
3. Rental Car		\$	\$
4. Lodging:		\$	\$
5. Registration fees:	\$	\$	\$
6. Mileage: _____ miles X .575 per mile*			\$

- Attach a copy of MapQuest to verify ALL mileage. Starting point is Pattison Street or your home whichever is closer to your destination.  
\*Miles to the Airport from Pattison Street is 102 miles round trip (no MapQuest needed)

**SECTION B**

DATE	OTHER EXPENSES		
	Airport Parking / Parking lot	\$	\$
	Luggage – Checked? N or Y	\$	\$
	Shuttle / Taxi	\$	\$
		\$	\$
		\$	\$
		\$	\$

**SECTION C**

1. Total Expenses:	\$	\$	\$
	1. Less total cash advances	\$	
	2. Total reimbursement due	\$	
	3. Or total due to IT	\$	

**TOTAL TRAVEL EXPENSES (add totals in the Total Expenses line) \$ \_\_\_\_\_**

**III. Certification**

I hereby certify under penalty of perjury that this is a true and correct claim for necessary expenses incurred by me and that no other payment has been received by me as reimbursement for these expenses.

1. Employee Signature:	2. Date:	3. Director Signature:	4. Date:
5. Travel General Ledger Account #:	6. Project Code:	7. Audited By:	8. Date:
9. Vendor # :	10. Invoice Date:	11. Invoice number:	12. Entered:

**IV. Meal Calculation**

**DAILY MEAL ALLOWANCE CHART**  
EFFECTIVE 10/1/15

<b>INCIDENTALS</b>	5.00	5.00	5.00	5.00	5.00	5.00
<b>BREAKFAST</b>	11.00	12.00	13.00	15.00	16.00	17.00
<b>LUNCH</b>	12.00	13.00	15.00	16.00	17.00	18.00
<b>DINNER</b>	23.00	24.00	26.00	28.00	31.00	34.00
<b>TOTAL</b>	<b>51.00</b>	<b>54.00</b>	<b>59.00</b>	<b>64.00</b>	<b>69.00</b>	<b>74.00</b>

**USE THIS CHART TO TRACK YOUR DAILY MEAL ALLOWANCE**

SUNDAY    MONDAY    TUESDAY    WEDNESDAY    THURSDAY    FRIDAY    SATURDAY

<b>TRAVEL DATES:</b>							
<b>INCIDENTALS</b>							
<b>BREAKFAST</b>							
<b>LUNCH</b>							
<b>DINNER</b>							
<b>TOTAL</b>							

**\* TOTAL MEAL ALLOWANCE FOR THIS TRIP:**

\*Transfer your Meal Allowance Total to the Meals box on page one of this form. It is located in Part II; Section A, Line #1.

**DAILY MEAL ALLOWANCE FOR COMMON DESTINATIONS\*\***

<u>Destination</u>	<u>Daily Amount</u>	<u>Government Hotel Rate</u>
Seattle WA and King County	\$74	\$157, Except May1-Sep 30 -\$202
Tacoma, Everett, Spokane WA	\$64	\$112, \$113, \$96
Vancouver WA, Portland, OR	\$64	\$151
Bellingham, Yakima, WA, All Unspecified cities**	\$51	\$89

\*\*If your city is not listed, check the county it is located in. If it is, use the rate shown. If neither can be found, then the standard daily meal allowance rate of \$51 applies. For a complete listing of Per Diem and Hotel Rate Allowances go to the Share Drive under Travel in the file 2015-2016 Per Diem Rates.

**Incidental Expense: Applicable daily when in travel status out of town. This covers fees and tips given to porters, baggage carriers, hotel staff and other similar miscellaneous expenses. Taxi & shuttles are excluded.**

**INTERCITY TRANSIT FORM-FA-2502-B**

See Also: POLICY-FA-2502

**SCHEDULE OF REASONABLE AND NECESSARY CBC\* EXPENSES**

<b>Transportation:</b>	<b>Reasonable and Necessary?</b>
Airporter (e.g., shuttle)	Yes
Public transportation (bus, taxi, subway)	Yes
Personal vehicle mileage	Yes
Transportation tickets (e.g., airline, train)	Yes
Taxi (to/from hotel, meetings, meals)	Yes
Taxi (personal)	No
Car rental when appropriate	Yes
Car rental insurance	No
Offsite parking at airport	Yes
Baggage fees, two maximum	Yes
Overweight baggage fees	No
Priority seating fees	CBC
<b>Meals:</b>	
Bar expenses	No
Meal for others	No
<b>Personal Sundries:</b>	
Clothes cleaning (short trips)	No
Clothes cleaning (after 5 days stay)	Yes
Clothing	No
Entertainment	No
Personal items (e.g. toothpaste)	No
Souvenirs and gifts	No
Newspapers and magazines	No
Travelers check fees	No
Personal grooming services	No
Theft, loss or damage to personal property	No
Trip Insurance	No
<b>Lodging:</b>	
Self	Yes
Other than self, with the exception of a care attendant	No
Internet access	CBC

\*Case-by-case basis – expense must be specifically approved by Director or designee

Effective: September 6, 2012  
Cancels: New

Page: 1 of 1

## INTERCITY TRANSIT FORM-FA-2502-C

See Also: POLICY-FA-2502

### MISCELLANEOUS REIMBUREMENT REQUEST

(For Lost or Unavailable Receipts)

Name: \_\_\_\_\_

Description: \_\_\_\_\_

Dollar Amount: \_\_\_\_\_

#### CERTIFICATION:

I hereby certify under penalty of perjury that this is a true and correct claim of necessary expenses incurred by me and no payment has been received by me as reimbursement for these expenses.

Date: \_\_\_\_\_

Signed: \_\_\_\_\_

Employee

Approved:

\_\_\_\_\_

Director or Designee

**INTERCITY TRANSIT TRAVEL FORM**

**I. Pre-Trip Authorization:**

**- SAMPLE -**

1. Name: Joe Smith Event: APTA Annual Conference
2. Destination: Austin, Texas Departure Date: 9/11/16 Return Date: 9/13/16
3. Estimated Total Cost of Travel (registration, airfare, lodging, meals, car etc.) Total: \_\_\_\_\_
4. Advance Travel Request Amount \$ \_\_\_\_\_ **-- Event Agenda must be Attached--**
5. Mode(s) of travel to be used: Airlines 6. Using a Staff Car? Y / N
7. Approved by: \_\_\_\_\_ Director or designee
8. Advance Travel Granted is: Cash Y / N or Check # \_\_\_\_\_ Initial: \_\_\_\_\_ Date: \_\_\_\_\_

**II. Travel Expenses:** All EXPENSES MUST HAVE matching Receipts attached (EXCEPT MEALS).

<u>SECTION A</u>	IT PAID THRU A/P	IT CREDIT CARDS	EMPLOYEE Per Diem, Expenses Paid, \$\$ Owing to IT
1. Meals (from IV. Meal Calculation worksheet):			\$142
2. Airline Travel:		\$248	\$
3. Rental Car		\$0	\$
4. Lodging:		\$600	\$
5. Registration fees:	\$	\$850	\$
6. Mileage: <u>33</u> miles X .575 per mile*			\$18.98

- Attach a copy of MapQuest to verify ALL mileage. Starting point is Pattison Street or your home whichever is closer to your destination.  
\*Miles to the Airport from Pattison Street is 102 miles round trip (no MapQuest needed)

**SECTION B**

DATE	OTHER EXPENSES		
9/11/16	Airport Parking / Parking lot	\$	\$60
9/11 & 9/13	Luggage – Checked? <u>N</u> or <u>Y</u>	\$	\$50
	Shuttle / Taxi	\$	\$
		\$	\$
		\$	\$
		\$	\$

**SECTION C**

<b>1. Total Expenses:</b>	<b>\$ 0</b>	<b>\$ 1,698</b>	<b>\$270.98</b>
	<b>1. Less total cash advances</b>		<b>\$ 0</b>
	<b>2. Total reimbursement due</b>		<b>\$270.98</b>
	<b>3. Or total due to IT</b>		<b>\$ 0</b>

**TOTAL TRAVEL EXPENSES (add totals in the Total Expenses line) \$ 1,968.98**

**III. Certification**

I hereby certify under penalty of perjury that this is a true and correct claim for necessary expenses incurred by me and that no other payment has been received by me as reimbursement for these expenses.

1. Employee Signature:	2. Date:	3. Director Signature:	4. Date:
5. Travel General Ledger Account #: 305090200000	6. Project Code: EX-014	7. Audited By:	8. Date:
9. Vendor # :	10. Invoice Date:	11. Invoice number:	12. Entered:



**IV. Meal Calculation**

**DAILY MEAL ALLOWANCE CHART**  
EFFECTIVE 10/1/15

<b>INCIDENTALS</b>	5.00	5.00	5.00	5.00	5.00	5.00
<b>BREAKFAST</b>	11.00	12.00	13.00	15.00	16.00	17.00
<b>LUNCH</b>	12.00	13.00	15.00	16.00	17.00	18.00
<b>DINNER</b>	23.00	24.00	26.00	28.00	31.00	34.00
<b>TOTAL</b>	<b>51.00</b>	<b>54.00</b>	<b>59.00</b>	<b>64.00</b>	<b>69.00</b>	<b>74.00</b>

**USE THIS CHART TO TRACK YOUR DAILY MEAL ALLOWANCE**

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
<b>TRAVEL DATES:</b>	9/11/16	9/12/16	9/13/16				
<b>INCIDENTALS</b>	\$5	\$5	\$5				
<b>BREAKFAST</b>		\$11	\$11				
<b>LUNCH</b>	\$12	\$12	\$12				
<b>DINNER</b>	\$23	\$23	\$23				
<b>TOTAL</b>	\$40	\$51	\$51				

**\* TOTAL MEAL ALLOWANCE FOR THIS TRIP: \$142**

\*Transfer your Meal Allowance Total to the Meals box on page one of this form. It is located in Part II; Section A, Line #1.

**DAILY MEAL ALLOWANCE FOR COMMON DESTINATIONS\*\***

<u>Destination</u>	<u>Daily Amount</u>	<u>Government Hotel Rate</u>
Seattle WA and King County	\$74	\$157, Except May1-Sep 30 -\$202
Tacoma, Everett, Spokane WA	\$64	\$112, \$113, \$96
Vancouver WA, Portland, OR	\$64	\$151
Bellingham, Yakima, WA, All Unspecified cities**	\$51	\$89

\*\*If your city is not listed, check the county it is located in. If it is, use the rate shown. If neither can be found, then the standard daily meal allowance rate of \$51 applies. For a complete listing of Per Diem and Hotel Rate Allowances go to the Share Drive under Travel in the file 2015-2016 Per Diem Rates.

**Incidental Expense: Applicable daily when in travel status out of town. This covers fees and tips given to porters, baggage carriers, hotel staff and other similar miscellaneous expenses. Taxi & shuttles are excluded.**



**FY 2016 Per Diem Rates - Effective October 1, 2015**

STATE	DESTINATION	COUNTY/LOCATION DEFINED	SEASON BEGIN	SEASON END	FY16 Lodging Rate	FY16 M&IE
	<b>Standard CONUS rate applies to all cities and counties not specifically listed. If the Cities is not listed then look for the county it is in. If not listed by City or by County then you will use this rate.</b>				<b>\$89</b>	<b>\$51</b>
AL	Birmingham	Jefferson / Shelby			\$ 94	\$ 59
AL	Gulf Shores	Baldwin	October 1	February 29	\$ 101	\$ 64
AL	Gulf Shores	Baldwin	March 1	July 31	\$ 130	\$ 64
AL	Gulf Shores	Baldwin	August 1	September 30	\$ 101	\$ 64
AL	Mobile	Mobile	October 1	December 31	\$ 89	\$ 59
AL	Mobile	Mobile	January 1	February 29	\$ 99	\$ 59
AL	Mobile	Mobile	March 1	September 30	\$ 89	\$ 59
AR	Hot Springs	Garland			\$ 101	\$ 59
AR	Little Rock	Pulaski			\$ 91	\$ 59
AZ	Grand Canyon / Flagstaff	Coconino / Yavapai less the city of Sedona	October 1	October 31	\$ 124	\$ 64
AZ	Grand Canyon / Flagstaff	Coconino / Yavapai less the city of Sedona	November 1	February 29	\$ 89	\$ 64
AZ	Grand Canyon / Flagstaff	Coconino / Yavapai less the city of Sedona	March 1	September 30	\$ 124	\$ 64
AZ	Kayenta	Navajo			\$ 112	\$ 59
AZ	Phoenix / Scottsdale	Maricopa	October 1	December 31	\$ 113	\$ 59
AZ	Phoenix / Scottsdale	Maricopa	January 1	March 31	\$ 161	\$ 59
AZ	Phoenix / Scottsdale	Maricopa	April 1	May 31	\$ 120	\$ 59
AZ	Phoenix / Scottsdale	Maricopa	June 1	August 31	\$ 89	\$ 59
AZ	Phoenix / Scottsdale	Maricopa	September 1	September 30	\$ 113	\$ 59
AZ	Sedona	City Limits of Sedona	October 1	February 29	\$ 134	\$ 74
AZ	Sedona	City Limits of Sedona	March 1	August 31	\$ 141	\$ 74
AZ	Sedona	City Limits of Sedona	September 1	September 30	\$ 134	\$ 74
AZ	Tucson	Pima	October 1	December 31	\$ 89	\$ 59
AZ	Tucson	Pima	January 1	February 29	\$ 106	\$ 59
AZ	Tucson	Pima	March 1	September 30	\$ 89	\$ 59
CA	Antioch / Brentwood / Concord	Contra Costa			\$ 132	\$ 64
CA	Bakersfield / Ridgecrest	Kern			\$ 95	\$ 59
CA	Barstow / Ontario / Victorville	San Bernardino			\$ 96	\$ 54
CA	Death Valley	Inyo			\$ 102	\$ 64
CA	Eureka / Arcata / McKinleyville	Humboldt	October 1	May 31	\$ 94	\$ 74
CA	Eureka / Arcata / McKinleyville	Humboldt	June 1	August 31	\$ 112	\$ 74
CA	Eureka / Arcata / McKinleyville	Humboldt	September 1	September 30	\$ 94	\$ 74
CA	Fresno	Fresno			\$ 92	\$ 64
CA	Los Angeles	Los Angeles / Orange / Ventura / Edwards AFB less the city of Santa Monica	October 1	December 31	\$ 150	\$ 64
CA	Los Angeles	Los Angeles / Orange / Ventura / Edwards AFB less the city of Santa Monica	January 1	March 31	\$ 157	\$ 64
CA	Los Angeles	Los Angeles / Orange / Ventura / Edwards AFB less the city of Santa Monica	April 1	September 30	\$ 150	\$ 64

CA	Mammoth Lakes	Mono	October 1	November 30	\$ 116	\$ 74
CA	Mammoth Lakes	Mono	December 1	February 29	\$ 159	\$ 74
CA	Mammoth Lakes	Mono	March 1	September 30	\$ 116	\$ 74
CA	Mill Valley / San Rafael / Novato	Marin	October 1	October 31	\$ 146	\$ 74
CA	Mill Valley / San Rafael / Novato	Marin	November 1	December 31	\$ 130	\$ 74
CA	Mill Valley / San Rafael / Novato	Marin	January 1	September 30	\$ 146	\$ 74
CA	Monterey	Monterey	October 1	June 30	\$ 134	\$ 74
CA	Monterey	Monterey	July 1	August 31	\$ 175	\$ 74
CA	Monterey	Monterey	September 1	September 30	\$ 134	\$ 74
CA	Napa	Napa	October 1	October 31	\$ 191	\$ 69
CA	Napa	Napa	November 1	April 30	\$ 149	\$ 69
CA	Napa	Napa	May 1	September 30	\$ 191	\$ 69
CA	Oakhurst	Madera	October 1	May 31	\$ 91	\$ 64
CA	Oakhurst	Madera	June 1	August 31	\$ 115	\$ 64
CA	Oakhurst	Madera	September 1	September 30	\$ 91	\$ 64
CA	Oakland	Alameda			\$ 140	\$ 69
CA	Palm Springs	Riverside	October 1	May 31	\$ 123	\$ 64
CA	Palm Springs	Riverside	June 1	August 31	\$ 92	\$ 64
CA	Palm Springs	Riverside	September 1	September 30	\$ 123	\$ 64
CA	Point Arena / Gualala	Mendocino			\$ 106	\$ 69
CA	Redding	Shasta			\$ 90	\$ 64
CA	Sacramento	Sacramento			\$ 112	\$ 64
CA	San Diego	San Diego	October 1	December 31	\$ 140	\$ 64
CA	San Diego	San Diego	January 1	July 31	\$ 153	\$ 64
CA	San Diego	San Diego	August 1	September 30	\$ 140	\$ 64
CA	San Francisco	San Francisco			\$ 250	\$ 74
CA	San Luis Obispo	San Luis Obispo	October 1	May 31	\$ 112	\$ 64
CA	San Luis Obispo	San Luis Obispo	June 1	August 31	\$ 133	\$ 64
CA	San Luis Obispo	San Luis Obispo	September 1	September 30	\$ 112	\$ 64
CA	San Mateo / Foster City / Belmont	San Mateo	October 1	December 31	\$ 178	\$ 69
CA	San Mateo / Foster City / Belmont	San Mateo	January 1	March 31	\$ 184	\$ 69
CA	San Mateo / Foster City / Belmont	San Mateo	April 1	September 30	\$ 178	\$ 69
CA	Santa Barbara	Santa Barbara	October 1	June 30	\$ 161	\$ 74
CA	Santa Barbara	Santa Barbara	July 1	August 31	\$ 211	\$ 74
CA	Santa Barbara	Santa Barbara	September 1	September 30	\$ 161	\$ 74
CA	Santa Cruz	Santa Cruz	October 1	May 31	\$ 129	\$ 59
CA	Santa Cruz	Santa Cruz	June 1	August 31	\$ 164	\$ 59
CA	Santa Cruz	Santa Cruz	September 1	September 30	\$ 129	\$ 59
CA	Santa Monica	City limits of Santa Monica	October 1	May 31	\$ 217	\$ 64
CA	Santa Monica	City limits of Santa Monica	June 1	August 31	\$ 252	\$ 64
CA	Santa Monica	City limits of Santa Monica	September 1	September 30	\$ 217	\$ 64
CA	Santa Rosa	Sonoma	October 1	October 31	\$ 134	\$ 64
CA	Santa Rosa	Sonoma	November 1	February 29	\$ 118	\$ 64
CA	Santa Rosa	Sonoma	March 1	September 30	\$ 134	\$ 64

CA	South Lake Tahoe	El Dorado	October 1	November 30	\$ 111	\$ 64
CA	South Lake Tahoe	El Dorado	December 1	June 30	\$ 136	\$ 64
CA	South Lake Tahoe	El Dorado	July 1	August 31	\$ 162	\$ 64
CA	South Lake Tahoe	El Dorado	September 1	September 30	\$ 111	\$ 64
CA	Stockton	San Joaquin			\$ 97	\$ 64
CA	Sunnyvale / Palo Alto / San Jose	Santa Clara	October 1	March 31	\$ 187	\$ 64
CA	Sunnyvale / Palo Alto / San Jose	Santa Clara	April 1	May 31	\$ 175	\$ 64
CA	Sunnyvale / Palo Alto / San Jose	Santa Clara	June 1	September 30	\$ 187	\$ 64
CA	Tahoe City	Placer			\$ 93	\$ 64
CA	Truckee	Nevada			\$ 120	\$ 74
CA	Visalia / Lemoore	Tulare / Kings			\$ 90	\$ 59
CA	West Sacramento / Davis	Yolo			\$ 113	\$ 64
CA	Yosemite National Park	Mariposa	October 1	December 31	\$ 118	\$ 69
CA	Yosemite National Park	Mariposa	January 1	May 31	\$ 107	\$ 69
CA	Yosemite National Park	Mariposa	June 1	August 31	\$ 132	\$ 69
CA	Yosemite National Park	Mariposa	September 1	September 30	\$ 118	\$ 69
CO	Aspen	Pitkin	October 1	November 30	\$ 115	\$ 74
CO	Aspen	Pitkin	December 1	March 31	\$ 266	\$ 74
CO	Aspen	Pitkin	April 1	May 31	\$ 114	\$ 74
CO	Aspen	Pitkin	June 1	August 31	\$ 193	\$ 74
CO	Aspen	Pitkin	September 1	September 30	\$ 115	\$ 74
CO	Boulder / Broomfield	Boulder / Broomfield			\$ 125	\$ 59
CO	Colorado Springs	El Paso			\$ 91	\$ 59
CO	Cortez	Montezuma	October 1	May 31	\$ 91	\$ 59
CO	Cortez	Montezuma	June 1	September 30	\$ 114	\$ 59
CO	Crested Butte / Gunnison	Gunnison	October 1	November 30	\$ 108	\$ 64
CO	Crested Butte / Gunnison	Gunnison	December 1	March 31	\$ 154	\$ 64
CO	Crested Butte / Gunnison	Gunnison	April 1	September 30	\$ 108	\$ 64
CO	Denver / Aurora	Denver / Adams / Arapahoe / Jefferson			\$ 172	\$ 69
CO	Douglas	Douglas			\$ 116	\$ 59
CO	Durango	La Plata	October 1	May 31	\$ 100	\$ 64
CO	Durango	La Plata	June 1	September 30	\$ 146	\$ 64
CO	Fort Collins / Loveland	Larimer			\$ 109	\$ 59
CO	Grand Lake	Grand	October 1	November 30	\$ 120	\$ 64
CO	Grand Lake	Grand	December 1	March 31	\$ 196	\$ 64
CO	Grand Lake	Grand	April 1	May 31	\$ 104	\$ 64
CO	Grand Lake	Grand	June 1	September 30	\$ 120	\$ 64
CO	Montrose	Montrose	October 1	May 31	\$ 89	\$ 64
CO	Montrose	Montrose	June 1	August 31	\$ 94	\$ 64
CO	Montrose	Montrose	September 1	September 30	\$ 89	\$ 64
CO	Silverthorne / Breckenridge	Summit	October 1	November 30	\$ 106	\$ 64
CO	Silverthorne / Breckenridge	Summit	December 1	March 31	\$ 167	\$ 64
CO	Silverthorne / Breckenridge	Summit	April 1	May 31	\$ 97	\$ 64
CO	Silverthorne / Breckenridge	Summit	June 1	September 30	\$ 106	\$ 64

CO	Steamboat Springs	Routt	October 1	November 30	\$ 104	\$ 74
CO	Steamboat Springs	Routt	December 1	March 31	\$ 178	\$ 74
CO	Steamboat Springs	Routt	April 1	May 31	\$ 89	\$ 74
CO	Steamboat Springs	Routt	June 1	September 30	\$ 104	\$ 74
CO	Telluride	San Miguel	October 1	November 30	\$ 134	\$ 74
CO	Telluride	San Miguel	December 1	March 31	\$ 354	\$ 74
CO	Telluride	San Miguel	April 1	May 31	\$ 142	\$ 74
CO	Telluride	San Miguel	June 1	August 31	\$ 187	\$ 74
CO	Telluride	San Miguel	September 1	September 30	\$ 134	\$ 74
CO	Vail	Eagle	October 1	November 30	\$ 130	\$ 74
CO	Vail	Eagle	December 1	March 31	\$ 350	\$ 74
CO	Vail	Eagle	April 1	June 30	\$ 144	\$ 74
CO	Vail	Eagle	July 1	August 31	\$ 176	\$ 74
CO	Vail	Eagle	September 1	September 30	\$ 130	\$ 74
CT	Bridgeport / Danbury	Fairfield			\$ 129	\$ 64
CT	Cromwell / Old Saybrook	Middlesex			\$ 93	\$ 64
CT	Hartford	Hartford			\$ 117	\$ 59
CT	New Haven	New Haven			\$ 96	\$ 64
CT	New London / Groton	New London			\$ 98	\$ 64
DC	District of Columbia	Washington DC (also the cities of Alexandria, Falls Church and Fairfax, and the counties of Arlington and Fairfax, in Virginia; and the counties of Montgomery and Prince George's in Maryland)	October 1	October 31	\$ 222	\$ 69
DC	District of Columbia	Washington DC (also the cities of Alexandria, Falls Church and Fairfax, and the counties of Arlington and Fairfax, in Virginia; and the counties of Montgomery and Prince George's in Maryland)	November 1	February 29	\$ 179	\$ 69
DC	District of Columbia	Washington DC (also the cities of Alexandria, Falls Church and Fairfax, and the counties of Arlington and Fairfax, in Virginia; and the counties of Montgomery and Prince George's in Maryland)	March 1	June 30	\$ 226	\$ 69
DC	District of Columbia	Washington DC (also the cities of Alexandria, Falls Church and Fairfax, and the counties of Arlington and Fairfax, in Virginia; and the counties of Montgomery and Prince George's in Maryland)	July 1	August 31	\$ 174	\$ 69
DC	District of Columbia	Washington DC (also the cities of Alexandria, Falls Church and Fairfax, and the counties of Arlington and Fairfax, in Virginia; and the counties of Montgomery and Prince George's in Maryland)	September 1	September 30	\$ 222	\$ 69

DE	Dover	Kent	October 1	April 30	\$ 89	\$ 54
DE	Dover	Kent	May 1	September 30	\$ 104	\$ 54
DE	Lewes	Sussex	October 1	June 30	\$ 92	\$ 59
DE	Lewes	Sussex	July 1	August 31	\$ 148	\$ 59
DE	Lewes	Sussex	September 1	September 30	\$ 92	\$ 59
DE	Wilmington	New Castle			\$ 122	\$ 54
FL	Boca Raton / Delray Beach / Jupiter	Palm Beach / Hendry	October 1	December 31	\$ 101	\$ 59
FL	Boca Raton / Delray Beach / Jupiter	Palm Beach / Hendry	January 1	April 30	\$ 175	\$ 59
FL	Boca Raton / Delray Beach / Jupiter	Palm Beach / Hendry	May 1	September 30	\$ 101	\$ 59
FL	Bradenton	Manatee	October 1	January 31	\$ 89	\$ 54
FL	Bradenton	Manatee	February 1	March 31	\$ 142	\$ 54
FL	Bradenton	Manatee	April 1	September 30	\$ 89	\$ 54
FL	Cocoa Beach	Brevard	October 1	January 31	\$ 107	\$ 64
FL	Cocoa Beach	Brevard	February 1	March 31	\$ 130	\$ 64
FL	Cocoa Beach	Brevard	April 1	September 30	\$ 107	\$ 64
FL	Daytona Beach	Volusia	October 1	January 31	\$ 89	\$ 59
FL	Daytona Beach	Volusia	February 1	March 31	\$ 118	\$ 59
FL	Daytona Beach	Volusia	April 1	July 31	\$ 97	\$ 59
FL	Daytona Beach	Volusia	August 1	September 30	\$ 89	\$ 59
FL	Fort Lauderdale	Broward	October 1	December 31	\$ 141	\$ 64
FL	Fort Lauderdale	Broward	January 1	March 31	\$ 199	\$ 64
FL	Fort Lauderdale	Broward	April 1	May 31	\$ 144	\$ 64
FL	Fort Lauderdale	Broward	June 1	September 30	\$ 110	\$ 64
FL	Fort Myers	Lee	October 1	December 31	\$ 101	\$ 59
FL	Fort Myers	Lee	January 1	April 30	\$ 165	\$ 59
FL	Fort Myers	Lee	May 1	September 30	\$ 101	\$ 59
FL	Fort Walton Beach / De Funiak Springs	Okaloosa / Walton	October 1	October 31	\$ 132	\$ 64
FL	Fort Walton Beach / De Funiak Springs	Okaloosa / Walton	November 1	February 29	\$ 91	\$ 64
FL	Fort Walton Beach / De Funiak Springs	Okaloosa / Walton	March 1	May 31	\$ 148	\$ 64
FL	Fort Walton Beach / De Funiak Springs	Okaloosa / Walton	June 1	July 31	\$ 203	\$ 64
FL	Fort Walton Beach / De Funiak Springs	Okaloosa / Walton	August 1	September 30	\$ 132	\$ 64
FL	Gainesville	Alachua			\$ 98	\$ 59
FL	Gulf Breeze	Santa Rosa	October 1	February 29	\$ 89	\$ 64
FL	Gulf Breeze	Santa Rosa	March 1	July 31	\$ 105	\$ 64
FL	Gulf Breeze	Santa Rosa	August 1	September 30	\$ 89	\$ 64
FL	Key West	Monroe	October 1	November 30	\$ 200	\$ 69
FL	Key West	Monroe	December 1	January 31	\$ 265	\$ 69
FL	Key West	Monroe	February 1	April 30	\$ 307	\$ 69
FL	Key West	Monroe	May 1	September 30	\$ 194	\$ 69

FL	Miami	Miami-Dade	October 1	November 30	\$ 148	\$ 64
FL	Miami	Miami-Dade	December 1	March 31	\$ 212	\$ 64
FL	Miami	Miami-Dade	April 1	May 31	\$ 160	\$ 64
FL	Miami	Miami-Dade	June 1	September 30	\$ 124	\$ 64
FL	Naples	Collier	October 1	December 31	\$ 145	\$ 64
FL	Naples	Collier	January 1	April 30	\$ 236	\$ 64
FL	Naples	Collier	May 1	September 30	\$ 125	\$ 64
FL	Orlando	Orange	October 1	March 31	\$ 127	\$ 59
FL	Orlando	Orange	April 1	September 30	\$ 110	\$ 59
FL	Panama City	Bay	October 1	February 29	\$ 89	\$ 59
FL	Panama City	Bay	March 1	May 31	\$ 120	\$ 59
FL	Panama City	Bay	June 1	July 31	\$ 131	\$ 59
FL	Panama City	Bay	August 1	September 30	\$ 89	\$ 59
FL	Pensacola	Escambia	October 1	February 29	\$ 100	\$ 59
FL	Pensacola	Escambia	March 1	May 31	\$ 114	\$ 59
FL	Pensacola	Escambia	June 1	July 31	\$ 140	\$ 59
FL	Pensacola	Escambia	August 1	September 30	\$ 100	\$ 59
FL	Punta Gorda	Charlotte	October 1	January 31	\$ 89	\$ 59
FL	Punta Gorda	Charlotte	February 1	March 31	\$ 137	\$ 59
FL	Punta Gorda	Charlotte	April 1	September 30	\$ 89	\$ 59
FL	Sarasota	Sarasota	October 1	November 30	\$ 98	\$ 59
FL	Sarasota	Sarasota	December 1	April 30	\$ 141	\$ 59
FL	Sarasota	Sarasota	May 1	September 30	\$ 98	\$ 59
FL	Sebring	Highlands			\$ 92	\$ 54
FL	St. Augustine	St. Johns			\$ 118	\$ 59
FL	Stuart	Martin	October 1	January 31	\$ 91	\$ 59
FL	Stuart	Martin	February 1	March 31	\$ 135	\$ 59
FL	Stuart	Martin	April 1	September 30	\$ 91	\$ 59
FL	Tallahassee	Leon			\$ 98	\$ 54
FL	Tampa / St. Petersburg	Pinellas / Hillsborough	October 1	December 31	\$ 106	\$ 54
FL	Tampa / St. Petersburg	Pinellas / Hillsborough	January 1	March 31	\$ 133	\$ 54
FL	Tampa / St. Petersburg	Pinellas / Hillsborough	April 1	September 30	\$ 106	\$ 54
FL	Vero Beach	Indian River	October 1	November 30	\$ 125	\$ 59
FL	Vero Beach	Indian River	December 1	April 30	\$ 169	\$ 59
FL	Vero Beach	Indian River	May 1	September 30	\$ 125	\$ 59
GA	Athens	Clarke			\$ 93	\$ 59
GA	Atlanta	Fulton / Dekalb / Cobb			\$ 138	\$ 69
GA	Augusta	Richmond			\$ 97	\$ 59
GA	Jekyll Island / Brunswick	Glynn	October 1	March 31	\$ 118	\$ 64
GA	Jekyll Island / Brunswick	Glynn	April 1	July 31	\$ 157	\$ 64
GA	Jekyll Island / Brunswick	Glynn	August 1	September 30	\$ 118	\$ 64
GA	Savannah	Chatham	October 1	February 29	\$ 108	\$ 59
GA	Savannah	Chatham	March 1	April 30	\$ 123	\$ 59
GA	Savannah	Chatham	May 1	September 30	\$ 108	\$ 59



IA	Cedar Rapids	Linn			\$ 91	\$ 54
IA	Dallas	Dallas			\$ 117	\$ 54
IA	Des Moines	Polk			\$ 101	\$ 59
ID	Bonner's Ferry / Sandpoint	Bonner / Boundary / Shoshone	October 1	May 31	\$ 89	\$ 64
ID	Bonner's Ferry / Sandpoint	Bonner / Boundary / Shoshone	June 1	September 30	\$ 111	\$ 64
ID	Coeur d'Alene	Kootenai	October 1	May 31	\$ 89	\$ 59
ID	Coeur d'Alene	Kootenai	June 1	August 31	\$ 131	\$ 59
ID	Coeur d'Alene	Kootenai	September 1	September 30	\$ 89	\$ 59
ID	Sun Valley / Ketchum	Blaine / Elmore			\$ 104	\$ 54
IL	Bolingbrook / Romeoville / Lemont	Will			\$ 94	\$ 54
IL	Chicago	Cook / Lake	October 1	November 30	\$ 212	\$ 74
IL	Chicago	Cook / Lake	December 1	February 29	\$ 141	\$ 74
IL	Chicago	Cook / Lake	March 1	April 30	\$ 160	\$ 74
IL	Chicago	Cook / Lake	May 1	August 31	\$ 200	\$ 74
IL	Chicago	Cook / Lake	September 1	September 30	\$ 212	\$ 74
IL	O'Fallon / Fairview Heights / Collinsville	Bond / Calhoun / Clinton / Jersey / Macoupin / Madison / Monroe / St. Clair			\$ 125	\$ 54
IL	Oak Brook Terrace	Dupage			\$ 108	\$ 59
IN	Bloomington	Monroe			\$ 104	\$ 69
IN	Ft. Wayne	Allen			\$ 90	\$ 54
IN	Hammond / Munster / Merrillville	Lake			\$ 94	\$ 59
IN	Indianapolis / Carmel	Marion / Hamilton			\$ 107	\$ 54
IN	Lafayette / West Lafayette	Tippecanoe			\$ 93	\$ 54
IN	South Bend	St. Joseph			\$ 92	\$ 59
KS	Kansas City / Overland Park	Wyandotte / Johnson / Leavenworth			\$ 112	\$ 64
KS	Wichita	Sedgwick			\$ 95	\$ 59
KY	Boone	Boone			\$ 92	\$ 54
KY	Kenton	Kenton			\$ 135	\$ 69
KY	Lexington	Fayette			\$ 102	\$ 54
KY	Louisville	Jefferson	October 1	January 31	\$ 111	\$ 59
KY	Louisville	Jefferson	February 1	May 31	\$ 127	\$ 59
KY	Louisville	Jefferson	June 1	September 30	\$ 111	\$ 59
LA	Alexandria / Leesville / Natchitoches	Allen / Jefferson Davis / Natchitoches / Rapides / Vernon Parishes			\$ 97	\$ 64
LA	Baton Rouge	East Baton Rouge Parish			\$ 98	\$ 59
LA	New Orleans	Orleans / St. Bernard / Jefferson / Plaquemine Parishes	October 1	December 31	\$ 153	\$ 64
LA	New Orleans	Orleans / St. Bernard / Jefferson / Plaquemine Parishes	January 1	April 30	\$ 160	\$ 64
LA	New Orleans	Orleans / St. Bernard / Jefferson / Plaquemine Parishes	May 1	September 30	\$ 122	\$ 64
MA	Andover	Essex			\$ 107	\$ 59
MA	Boston / Cambridge	Suffolk, city of Cambridge	October 1	October 31	\$ 275	\$ 69
MA	Boston / Cambridge	Suffolk, city of Cambridge	November 1	March 31	\$ 198	\$ 69

MA	Boston / Cambridge	Suffolk, city of Cambridge	April 1	June 30	\$ 247	\$ 69
MA	Boston / Cambridge	Suffolk, city of Cambridge	July 1	August 31	\$ 233	\$ 69
MA	Boston / Cambridge	Suffolk, city of Cambridge	September 1	September 30	\$ 275	\$ 69
MA	Burlington / Woburn	Middlesex less the city of Cambridge			\$ 136	\$ 64
MA	Falmouth	City limits of Falmouth	October 1	June 30	\$ 116	\$ 64
MA	Falmouth	City limits of Falmouth	July 1	August 31	\$ 199	\$ 64
MA	Falmouth	City limits of Falmouth	September 1	September 30	\$ 116	\$ 64
MA	Hyannis	Barnstable less the city of Falmouth	October 1	June 30	\$ 102	\$ 64
MA	Hyannis	Barnstable less the city of Falmouth	July 1	August 31	\$ 161	\$ 64
MA	Hyannis	Barnstable less the city of Falmouth	September 1	September 30	\$ 102	\$ 64
MA	Martha's Vineyard	Dukes	October 1	May 31	\$ 126	\$ 74
MA	Martha's Vineyard	Dukes	June 1	September 30	\$ 276	\$ 74
MA	Nantucket	Nantucket	October 1	December 31	\$ 163	\$ 74
MA	Nantucket	Nantucket	January 1	May 31	\$ 128	\$ 74
MA	Nantucket	Nantucket	June 1	August 31	\$ 275	\$ 74
MA	Nantucket	Nantucket	September 1	September 30	\$ 163	\$ 74
MA	Northampton	Hampshire			\$ 106	\$ 64
MA	Pittsfield	Berkshire			\$ 120	\$ 64
MA	Plymouth / Taunton / New Bedford	Plymouth / Bristol			\$ 103	\$ 59
MA	Quincy	Norfolk			\$ 139	\$ 59
MA	Springfield	Hampden			\$ 105	\$ 59
MA	Worcester	Worcester			\$ 111	\$ 59
MD	Aberdeen / Bel Air / Belcamp	Harford			\$ 99	\$ 59
MD	Annapolis	Anne Arundel	October 1	October 31	\$ 121	\$ 69
MD	Annapolis	Anne Arundel	November 1	April 30	\$ 101	\$ 69
MD	Annapolis	Anne Arundel	May 1	September 30	\$ 121	\$ 69
MD	Baltimore City	Baltimore City	October 1	November 30	\$ 158	\$ 69
MD	Baltimore City	Baltimore City	December 1	February 29	\$ 123	\$ 69
MD	Baltimore City	Baltimore City	March 1	August 31	\$ 151	\$ 69
MD	Baltimore City	Baltimore City	September 1	September 30	\$ 158	\$ 69
MD	Baltimore County	Baltimore			\$ 98	\$ 59
MD	Cambridge / St. Michaels	Dorchester / Talbot	October 1	March 31	\$ 111	\$ 64
MD	Cambridge / St. Michaels	Dorchester / Talbot	April 1	August 31	\$ 148	\$ 64
MD	Cambridge / St. Michaels	Dorchester / Talbot	September 1	September 30	\$ 111	\$ 64
MD	Centreville	Queen Anne	October 1	November 30	\$ 125	\$ 69
MD	Centreville	Queen Anne	December 1	January 31	\$ 102	\$ 69
MD	Centreville	Queen Anne	February 1	September 30	\$ 125	\$ 69
MD	Columbia	Howard			\$ 106	\$ 64
MD	Frederick	Frederick			\$ 98	\$ 59
MD	Lexington Park / Leonardtown / Lusby	St. Mary's / Calvert			\$ 91	\$ 59
MD	Ocean City	Worcester	October 1	May 31	\$ 89	\$ 64
MD	Ocean City	Worcester	June 1	August 31	\$ 212	\$ 64
MD	Ocean City	Worcester	September 1	September 30	\$ 89	\$ 64
ME	Bar Harbor	Hancock	October 1	October 31	\$ 132	\$ 74

ME	Bar Harbor	Hancock	November 1	June 30	\$ 106	\$ 74
ME	Bar Harbor	Hancock	July 1	August 31	\$ 168	\$ 74
ME	Bar Harbor	Hancock	September 1	September 30	\$ 132	\$ 74
ME	Kennebunk / Kittery / Sanford	York	October 1	November 30	\$ 106	\$ 59
ME	Kennebunk / Kittery / Sanford	York	December 1	March 31	\$ 89	\$ 59
ME	Kennebunk / Kittery / Sanford	York	April 1	June 30	\$ 96	\$ 59
ME	Kennebunk / Kittery / Sanford	York	July 1	August 31	\$ 142	\$ 59
ME	Kennebunk / Kittery / Sanford	York	September 1	September 30	\$ 106	\$ 59
ME	Portland	Cumberland / Sagadahoc	October 1	October 31	\$ 131	\$ 59
ME	Portland	Cumberland / Sagadahoc	November 1	June 30	\$ 103	\$ 59
ME	Portland	Cumberland / Sagadahoc	July 1	August 31	\$ 151	\$ 59
ME	Portland	Cumberland / Sagadahoc	September 1	September 30	\$ 131	\$ 59
ME	Rockport	Knox	October 1	June 30	\$ 89	\$ 69
ME	Rockport	Knox	July 1	August 31	\$ 113	\$ 69
ME	Rockport	Knox	September 1	September 30	\$ 89	\$ 69
MI	Ann Arbor	Washtenaw			\$ 111	\$ 59
MI	Benton Harbor / St. Joseph / Stevensville	Berrien			\$ 93	\$ 54
MI	Detroit	Wayne			\$ 115	\$ 54
MI	East Lansing / Lansing	Ingham / Eaton			\$ 96	\$ 59
MI	Grand Rapids	Kent			\$ 103	\$ 59
MI	Holland	Ottawa			\$ 98	\$ 59
MI	Kalamazoo / Battle Creek	Kalamazoo / Calhoun			\$ 96	\$ 54
MI	Mackinac Island	Mackinac	October 1	June 30	\$ 89	\$ 59
MI	Mackinac Island	Mackinac	July 1	August 31	\$ 103	\$ 59
MI	Mackinac Island	Mackinac	September 1	September 30	\$ 89	\$ 59
MI	Midland	Midland			\$ 102	\$ 54
MI	Muskegon	Muskegon	October 1	May 31	\$ 89	\$ 54
MI	Muskegon	Muskegon	June 1	August 31	\$ 111	\$ 54
MI	Muskegon	Muskegon	September 1	September 30	\$ 89	\$ 54
MI	Petoskey	Emmet	October 1	November 30	\$ 94	\$ 59
MI	Petoskey	Emmet	December 1	August 31	\$ 101	\$ 59
MI	Petoskey	Emmet	September 1	September 30	\$ 94	\$ 59
MI	Pontiac / Auburn Hills	Oakland			\$ 103	\$ 54
MI	South Haven	Van Buren	October 1	May 31	\$ 89	\$ 59
MI	South Haven	Van Buren	June 1	August 31	\$ 106	\$ 59
MI	South Haven	Van Buren	September 1	September 30	\$ 89	\$ 59
MI	Traverse City / Leland	Grand Traverse / Leelanau	October 1	October 31	\$ 100	\$ 74
MI	Traverse City / Leland	Grand Traverse / Leelanau	November 1	June 30	\$ 89	\$ 74
MI	Traverse City / Leland	Grand Traverse / Leelanau	July 1	August 31	\$ 168	\$ 74
MI	Traverse City / Leland	Grand Traverse / Leelanau	September 1	September 30	\$ 100	\$ 74
MN	Duluth	St. Louis	October 1	October 31	\$ 142	\$ 64
MN	Duluth	St. Louis	November 1	May 31	\$ 109	\$ 64
MN	Duluth	St. Louis	June 1	September 30	\$ 142	\$ 64

MN	Eagan / Burnsville / Mendota Heights	Dakota			\$ 96	\$ 59
MN	Minneapolis / St. Paul	Hennepin / Ramsey			\$ 140	\$ 64
MN	Rochester	Olmsted			\$ 115	\$ 64
MO	Kansas City	Jackson / Clay / Cass / Platte			\$ 112	\$ 64
MO	St. Louis	St. Louis / St. Louis City / St. Charles / Crawford / Franklin / Jefferson / Lincoln / Warren / Washington			\$ 125	\$ 54
MS	Oxford	Lafayette			\$ 105	\$ 64
MS	Southaven	Desoto			\$ 100	\$ 59
MS	Starkville	Oktibbeha			\$ 98	\$ 54
MT	Big Sky / West Yellowstone	Gallatin	October 1	May 31	\$ 89	\$ 59
MT	Big Sky / West Yellowstone	Gallatin	June 1	September 30	\$ 138	\$ 59
MT	Butte	Silver Bow			\$ 93	\$ 64
MT	Glendive / Sidney	Dawson / Richland			\$ 146	\$ 69
MT	Helena	Lewis and Clark			\$ 92	\$ 64
MT	Missoula / Polson / Kalispell	Missoula / Lake / Flathead	October 1	June 30	\$ 95	\$ 59
MT	Missoula / Polson / Kalispell	Missoula / Lake / Flathead	July 1	August 31	\$ 136	\$ 59
MT	Missoula / Polson / Kalispell	Missoula / Lake / Flathead	September 1	September 30	\$ 95	\$ 59
NC	Asheville	Buncombe			\$ 107	\$ 59
NC	Atlantic Beach / Morehead City	Carteret	October 1	May 31	\$ 89	\$ 64
NC	Atlantic Beach / Morehead City	Carteret	June 1	August 31	\$ 114	\$ 64
NC	Atlantic Beach / Morehead City	Carteret	September 1	September 30	\$ 89	\$ 64
NC	Chapel Hill	Orange			\$ 119	\$ 69
NC	Charlotte	Mecklenburg			\$ 117	\$ 59
NC	Durham	Durham			\$ 99	\$ 59
NC	Fayetteville	Cumberland			\$ 102	\$ 54
NC	Greensboro	Guilford	October 1	April 30	\$ 100	\$ 54
NC	Greensboro	Guilford	May 1	September 30	\$ 91	\$ 54
NC	Kill Devil	Dare	October 1	March 31	\$ 91	\$ 64
NC	Kill Devil	Dare	April 1	May 31	\$ 104	\$ 64
NC	Kill Devil	Dare	June 1	August 31	\$ 163	\$ 64
NC	Kill Devil	Dare	September 1	September 30	\$ 91	\$ 64
NC	New Bern / Havelock	Craven			\$ 91	\$ 54
NC	Raleigh	Wake			\$ 104	\$ 59
NC	Wilmington	New Hanover			\$ 98	\$ 59
ND	Dickinson / Beulah	Stark / Mercer / Billings			\$ 120	\$ 69
ND	Minot	Ward			\$ 91	\$ 64
ND	Williston	Williams / Mountrail / McKenzie			\$ 146	\$ 69
NE	Omaha	Douglas			\$ 104	\$ 64
NH	Concord	Merrimack			\$ 94	\$ 59
NH	Conway	Caroll	October 1	February 29	\$ 125	\$ 54
NH	Conway	Caroll	March 1	June 30	\$ 102	\$ 54
NH	Conway	Caroll	July 1	August 31	\$ 170	\$ 54
NH	Conway	Caroll	September 1	September 30	\$ 125	\$ 54

NH	Durham	Strafford			\$ 99	\$ 54
NH	Laconia	Belknap	October 1	May 31	\$ 92	\$ 69
NH	Laconia	Belknap	June 1	September 30	\$ 116	\$ 69
NH	Lebanon / Lincoln / West Lebanon	Grafton / Sullivan			\$ 118	\$ 64
NH	Manchester	Hillsborough			\$ 95	\$ 64
NH	Portsmouth	Rockingham	October 1	June 30	\$ 107	\$ 59
NH	Portsmouth	Rockingham	July 1	August 31	\$ 142	\$ 59
NH	Portsmouth	Rockingham	September 1	September 30	\$ 107	\$ 59
NJ	Atlantic City / Ocean City / Cape May	Atlantic / Cape May			\$ 97	\$ 64
NJ	Cherry Hill / Moorestown	Camden / Burlington			\$ 98	\$ 59
NJ	Eatontown / Freehold	Monmouth			\$ 101	\$ 59
NJ	Edison / Piscataway	Middlesex			\$ 110	\$ 59
NJ	Flemington	Hunterdon			\$ 115	\$ 64
NJ	Newark	Essex / Bergen / Hudson / Passaic			\$ 136	\$ 64
NJ	Parsippany	Morris			\$ 142	\$ 59
NJ	Princeton / Trenton	Mercer			\$ 128	\$ 59
NJ	Somerset	Somerset			\$ 140	\$ 59
NJ	Springfield / Cranford / New Providence	Union			\$ 117	\$ 59
NJ	Toms River	Ocean	October 1	May 31	\$ 89	\$ 64
NJ	Toms River	Ocean	June 1	August 31	\$ 102	\$ 64
NJ	Toms River	Ocean	September 1	September 30	\$ 89	\$ 64
NM	Carlsbad	Eddy			\$ 148	\$ 54
NM	Las Cruces	Dona Ana			\$ 94	\$ 59
NM	Santa Fe	Santa Fe			\$ 99	\$ 64
NM	Taos	Taos			\$ 93	\$ 69
NV	Incline Village / Reno / Sparks	Washoe	October 1	June 30	\$ 97	\$ 64
NV	Incline Village / Reno / Sparks	Washoe	July 1	August 31	\$ 136	\$ 64
NV	Incline Village / Reno / Sparks	Washoe	September 1	September 30	\$ 97	\$ 64
NV	Las Vegas	Clark	October 1	January 31	\$ 108	\$ 64
NV	Las Vegas	Clark	February 1	August 31	\$ 93	\$ 64
NV	Las Vegas	Clark	September 1	September 30	\$ 108	\$ 64
NY	Albany	Albany			\$ 115	\$ 59
NY	Binghamton / Owego	Broome / Tioga			\$ 99	\$ 59
NY	Buffalo	Erie			\$ 112	\$ 64
NY	Floral Park / Garden City / Great Neck	Nassau			\$ 150	\$ 69
NY	Glens Falls	Warren	October 1	June 30	\$ 99	\$ 64
NY	Glens Falls	Warren	July 1	August 31	\$ 160	\$ 64
NY	Glens Falls	Warren	September 1	September 30	\$ 99	\$ 64
NY	Ithaca / Waterloo / Romulus	Tompkins / Seneca			\$ 121	\$ 59
NY	Kingston	Ulster			\$ 115	\$ 69
NY	Lake Placid	Essex	October 1	November 30	\$ 115	\$ 74
NY	Lake Placid	Essex	December 1	February 29	\$ 140	\$ 74
NY	Lake Placid	Essex	March 1	June 30	\$ 107	\$ 74

NY	Lake Placid	Essex	July 1	August 31	\$ 172	\$ 74
NY	Lake Placid	Essex	September 1	September 30	\$ 115	\$ 74
NY	New York City	Bronx / Kings / New York / Queens / Richmond	October 1	December 31	\$ 306	\$ 74
NY	New York City	Bronx / Kings / New York / Queens / Richmond	January 1	February 29	\$ 181	\$ 74
NY	New York City	Bronx / Kings / New York / Queens / Richmond	March 1	June 30	\$ 270	\$ 74
NY	New York City	Bronx / Kings / New York / Queens / Richmond	July 1	August 31	\$ 242	\$ 74
NY	New York City	Bronx / Kings / New York / Queens / Richmond	September 1	September 30	\$ 306	\$ 74
NY	Niagara Falls	Niagara	October 1	June 30	\$ 89	\$ 59
NY	Niagara Falls	Niagara	July 1	August 31	\$ 114	\$ 59
NY	Niagara Falls	Niagara	September 1	September 30	\$ 89	\$ 59
NY	Nyack / Palisades	Rockland			\$ 112	\$ 64
NY	Poughkeepsie	Dutchess			\$ 104	\$ 64
NY	Riverhead / Ronkonkoma / Melville	Suffolk			\$ 126	\$ 64
NY	Rochester	Monroe			\$ 101	\$ 59
NY	Saratoga Springs / Schenectady	Saratoga / Schenectady	October 1	June 30	\$ 120	\$ 64
NY	Saratoga Springs / Schenectady	Saratoga / Schenectady	July 1	August 31	\$ 186	\$ 64
NY	Saratoga Springs / Schenectady	Saratoga / Schenectady	September 1	September 30	\$ 120	\$ 64
NY	Syracuse / Oswego	Onondaga / Oswego			\$ 100	\$ 59
NY	Tarrytown / White Plains / New Rochelle	Westchester			\$ 151	\$ 64
NY	Troy	Rensselaer			\$ 107	\$ 64
NY	Watertown	Jefferson			\$ 94	\$ 54
NY	West Point	Orange			\$ 106	\$ 59
OH	Akron	Summit			\$ 103	\$ 54
OH	Canton	Stark			\$ 106	\$ 59
OH	Cincinnati	Hamilton / Clermont			\$ 135	\$ 69
OH	Cleveland	Cuyahoga			\$ 125	\$ 69
OH	Columbus	Franklin			\$ 109	\$ 59
OH	Dayton / Fairborn	Greene / Darke / Montgomery			\$ 90	\$ 59
OH	Hamilton	Butler / Warren			\$ 101	\$ 54
OH	Medina / Wooster	Wayne / Medina			\$ 100	\$ 54
OH	Mentor	Lake			\$ 97	\$ 59
OH	Sandusky / Bellevue	Erie / Huron			\$ 96	\$ 54
OH	Youngstown	Mahoning / Trumbull			\$ 95	\$ 54
OK	Enid	Garfield			\$ 111	\$ 59
OK	Oklahoma City	Oklahoma			\$ 98	\$ 59
OR	Beaverton	Washington			\$ 119	\$ 59
OR	Bend	Deschutes	October 1	June 30	\$ 102	\$ 59
OR	Bend	Deschutes	July 1	August 31	\$ 130	\$ 59

OR	Bend	Deschutes	September 1	September 30	\$ 102	\$ 59
OR	Clackamas	Clackamas			\$ 102	\$ 59
OR	Eugene / Florence	Lane			\$ 106	\$ 59
OR	Lincoln City	Lincoln	October 1	June 30	\$ 98	\$ 59
OR	Lincoln City	Lincoln	July 1	August 31	\$ 125	\$ 59
OR	Lincoln City	Lincoln	September 1	September 30	\$ 98	\$ 59
OR	Portland	Multnomah			\$ 151	\$ 64
OR	Seaside	Clatsop	October 1	June 30	\$ 105	\$ 69
OR	Seaside	Clatsop	July 1	August 31	\$ 156	\$ 69
OR	Seaside	Clatsop	September 1	September 30	\$ 105	\$ 69
PA	Allentown / Easton / Bethlehem	Lehigh / Northampton			\$ 91	\$ 59
PA	Bucks	Bucks			\$ 100	\$ 59
PA	Chester / Radnor / Essington	Delaware			\$ 101	\$ 64
PA	Erie	Erie			\$ 95	\$ 54
PA	Gettysburg	Adams	October 1	October 31	\$ 98	\$ 64
PA	Gettysburg	Adams	November 1	March 31	\$ 89	\$ 64
PA	Gettysburg	Adams	April 1	September 30	\$ 98	\$ 64
PA	Harrisburg	Dauphin County excluding Hershey			\$ 106	\$ 69
PA	Hershey	Hershey	October 1	October 31	\$ 120	\$ 69
PA	Hershey	Hershey	November 1	May 31	\$ 108	\$ 69
PA	Hershey	Hershey	June 1	August 31	\$ 176	\$ 69
PA	Hershey	Hershey	September 1	September 30	\$ 120	\$ 69
PA	Lancaster	Lancaster			\$ 109	\$ 59
PA	Malvern / Frazer / Berwyn	Chester			\$ 124	\$ 59
PA	Mechanicsburg	Cumberland			\$ 90	\$ 54
PA	Montgomery	Montgomery			\$ 124	\$ 64
PA	Philadelphia	Philadelphia	October 1	November 30	\$ 174	\$ 64
PA	Philadelphia	Philadelphia	December 1	February 29	\$ 144	\$ 64
PA	Philadelphia	Philadelphia	March 1	June 30	\$ 168	\$ 64
PA	Philadelphia	Philadelphia	July 1	August 31	\$ 155	\$ 64
PA	Philadelphia	Philadelphia	September 1	September 30	\$ 174	\$ 64
PA	Pittsburgh	Allegheny			\$ 130	\$ 54
PA	Reading	Berks			\$ 99	\$ 54
PA	Scranton	Lackawanna			\$ 92	\$ 59
PA	State College	Centre			\$ 95	\$ 59
RI	East Greenwich / Warwick / North Kingstown	Kent / Washington			\$ 95	\$ 59
RI	Jamestown / Middletown / Newport	Newport	October 1	October 31	\$ 166	\$ 59
RI	Jamestown / Middletown / Newport	Newport	November 1	May 31	\$ 107	\$ 59
RI	Jamestown / Middletown / Newport	Newport	June 1	August 31	\$ 192	\$ 59
RI	Jamestown / Middletown / Newport	Newport	September 1	September 30	\$ 166	\$ 59
RI	Providence / Bristol	Providence / Bristol			\$ 138	\$ 59
SC	Aiken	Aiken			\$ 93	\$ 59
SC	Charleston	Charleston / Berkeley / Dorchester	October 1	November 30	\$ 171	\$ 69

SC	Charleston	Charleston / Berkeley / Dorchester	December 1	February 29	\$ 145	\$ 69
SC	Charleston	Charleston / Berkeley / Dorchester	March 1	May 31	\$ 203	\$ 69
SC	Charleston	Charleston / Berkeley / Dorchester	June 1	September 30	\$ 171	\$ 69
SC	Columbia	Richland / Lexington			\$ 99	\$ 59
SC	Hilton Head	Beaufort	October 1	March 31	\$ 103	\$ 64
SC	Hilton Head	Beaufort	April 1	August 31	\$ 144	\$ 64
SC	Hilton Head	Beaufort	September 1	September 30	\$ 103	\$ 64
SC	Myrtle Beach	Horry	October 1	March 31	\$ 89	\$ 59
SC	Myrtle Beach	Horry	April 1	May 31	\$ 105	\$ 59
SC	Myrtle Beach	Horry	June 1	August 31	\$ 151	\$ 59
SC	Myrtle Beach	Horry	September 1	September 30	\$ 89	\$ 59
SD	Hot Springs	Fall River / Custer	October 1	October 31	\$ 93	\$ 59
SD	Hot Springs	Fall River / Custer	November 1	May 31	\$ 89	\$ 59
SD	Hot Springs	Fall River / Custer	June 1	August 31	\$ 126	\$ 59
SD	Hot Springs	Fall River / Custer	September 1	September 30	\$ 93	\$ 59
SD	Rapid City	Pennington	October 1	May 31	\$ 89	\$ 59
SD	Rapid City	Pennington	June 1	August 31	\$ 137	\$ 59
SD	Rapid City	Pennington	September 1	September 30	\$ 89	\$ 59
SD	Sturgis / Spearfish	Meade / Butte / Lawrence	October 1	May 31	\$ 89	\$ 59
SD	Sturgis / Spearfish	Meade / Butte / Lawrence	June 1	August 31	\$ 126	\$ 59
SD	Sturgis / Spearfish	Meade / Butte / Lawrence	September 1	September 30	\$ 89	\$ 59
TN	Brentwood / Franklin	Williamson			\$ 114	\$ 59
TN	Chattanooga	Hamilton			\$ 95	\$ 64
TN	Knoxville	Knox			\$ 92	\$ 59
TN	Memphis	Shelby			\$ 106	\$ 59
TN	Nashville	Davidson			\$ 145	\$ 59
TX	Arlington / Fort Worth / Grapevine	Tarrant County / City of Grapevine			\$ 149	\$ 59
TX	Austin	Travis	October 1	December 31	\$ 135	\$ 59
TX	Austin	Travis	January 1	March 31	\$ 159	\$ 59
TX	Austin	Travis	April 1	September 30	\$ 135	\$ 59
TX	Big Spring	Howard			\$ 171	\$ 54
TX	College Station	Brazos			\$ 114	\$ 59
TX	Corpus Christi	Nueces			\$ 105	\$ 59
TX	Dallas	Dallas	October 1	December 31	\$ 125	\$ 64
TX	Dallas	Dallas	January 1	May 31	\$ 138	\$ 64
TX	Dallas	Dallas	June 1	September 30	\$ 125	\$ 64
TX	El Paso	El Paso			\$ 95	\$ 59
TX	Galveston	Galveston	October 1	May 31	\$ 99	\$ 64
TX	Galveston	Galveston	June 1	August 31	\$ 129	\$ 64
TX	Galveston	Galveston	September 1	September 30	\$ 99	\$ 64
TX	Houston (L.B. Johnson Space Center)	Montgomery / Fort Bend / Harris	October 1	January 31	\$ 131	\$ 59
TX	Houston (L.B. Johnson Space Center)	Montgomery / Fort Bend / Harris	February 1	May 31	\$ 147	\$ 59
TX	Houston (L.B. Johnson Space Center)	Montgomery / Fort Bend / Harris	June 1	September 30	\$ 131	\$ 59
TX	Laredo	Webb			\$ 99	\$ 59



TX	McAllen	Hidalgo			\$ 93	\$ 59
TX	Midland	Midland	October 1	October 31	\$ 185	\$ 64
TX	Midland	Midland	November 1	January 31	\$ 174	\$ 64
TX	Midland	Midland	February 1	September 30	\$ 185	\$ 64
TX	Pearsall	Frio / Medina / La Salle	October 1	March 31	\$ 119	\$ 54
TX	Pearsall	Frio / Medina / La Salle	April 1	May 31	\$ 142	\$ 54
TX	Pearsall	Frio / Medina / La Salle	June 1	September 30	\$ 119	\$ 54
TX	Pecos	Reeves			\$ 152	\$ 54
TX	Plano	Collin			\$ 114	\$ 59
TX	Round Rock	Williamson			\$ 96	\$ 59
TX	San Angelo	Tom Green			\$ 136	\$ 59
TX	San Antonio	Bexar			\$ 120	\$ 64
TX	South Padre Island	Cameron	October 1	May 31	\$ 89	\$ 59
TX	South Padre Island	Cameron	June 1	August 31	\$ 117	\$ 59
TX	South Padre Island	Cameron	September 1	September 30	\$ 89	\$ 59
TX	Waco	McLennan			\$ 93	\$ 59
UT	Moab	Grand	October 1	October 31	\$ 143	\$ 64
UT	Moab	Grand	November 1	February 29	\$ 89	\$ 64
UT	Moab	Grand	March 1	September 30	\$ 143	\$ 64
UT	Park City	Summit	October 1	November 30	\$ 118	\$ 74
UT	Park City	Summit	December 1	March 31	\$ 232	\$ 74
UT	Park City	Summit	April 1	September 30	\$ 118	\$ 74
UT	Provo	Utah			\$ 91	\$ 59
UT	Salt Lake City	Salt Lake / Tooele	October 1	December 31	\$ 108	\$ 59
UT	Salt Lake City	Salt Lake / Tooele	January 1	March 31	\$ 123	\$ 59
UT	Salt Lake City	Salt Lake / Tooele	April 1	September 30	\$ 108	\$ 59
VA	Abingdon	Washington			\$ 98	\$ 69
VA	Blacksburg	Montgomery			\$ 100	\$ 59
VA	Charlottesville	City of Charlottesville / Albemarle / Greene			\$ 128	\$ 69
VA	Loudoun	Loudoun			\$ 97	\$ 59
VA	Lynchburg	Campbell / Lynchburg City			\$ 94	\$ 59
VA	Richmond	City of Richmond			\$ 121	\$ 64
VA	Roanoke	City limits of Roanoke			\$ 104	\$ 59
VA	Virginia Beach	City of Virginia Beach	October 1	May 31	\$ 96	\$ 59
VA	Virginia Beach	City of Virginia Beach	June 1	August 31	\$ 176	\$ 59
VA	Virginia Beach	City of Virginia Beach	September 1	September 30	\$ 96	\$ 59
VA	Wallops Island	Accomack	October 1	June 30	\$ 99	\$ 64
VA	Wallops Island	Accomack	July 1	August 31	\$ 180	\$ 64
VA	Wallops Island	Accomack	September 1	September 30	\$ 99	\$ 64
VA	Warrenton	Fauquier			\$ 98	\$ 59
VA	Williamsburg / York	James City / York Counties / City of Williamsburg	October 1	February 29	\$ 89	\$ 64
VA	Williamsburg / York	James City / York Counties / City of Williamsburg	March 1	August 31	\$ 96	\$ 64

VA	Williamsburg / York	James City / York Counties / City of Williamsburg	September 1	September 30	\$ 89	\$ 64
VT	Burlington / St. Albans / Middlebury	Chittenden / Franklin / Addison	October 1	October 31	\$ 128	\$ 64
VT	Burlington / St. Albans / Middlebury	Chittenden / Franklin / Addison	November 1	April 30	\$ 104	\$ 64
VT	Burlington / St. Albans / Middlebury	Chittenden / Franklin / Addison	May 1	September 30	\$ 128	\$ 64
VT	Manchester	Bennington	October 1	October 31	\$ 119	\$ 69
VT	Manchester	Bennington	November 1	June 30	\$ 98	\$ 69
VT	Manchester	Bennington	July 1	September 30	\$ 119	\$ 69
VT	Montpelier	Washington			\$ 115	\$ 74
VT	Stowe	Lamoille	October 1	October 31	\$ 136	\$ 74
VT	Stowe	Lamoille	November 1	June 30	\$ 119	\$ 74
VT	Stowe	Lamoille	July 1	September 30	\$ 136	\$ 74
VT	White River Junction	Windsor			\$ 100	\$ 69
WA	Everett / Lynnwood	Snohomish			\$ 113	\$ 64
WA	Ocean Shores	Grays Harbor	October 1	June 30	\$ 89	\$ 69
WA	Ocean Shores	Grays Harbor	July 1	August 31	\$ 110	\$ 69
WA	Ocean Shores	Grays Harbor	September 1	September 30	\$ 89	\$ 69
WA	Olympia / Tumwater	Thurston			\$ 99	\$ 69
WA	Port Angeles / Port Townsend	Clallam / Jefferson	October 1	June 30	\$ 100	\$ 74
WA	Port Angeles / Port Townsend	Clallam / Jefferson	July 1	August 31	\$ 137	\$ 74
WA	Port Angeles / Port Townsend	Clallam / Jefferson	September 1	September 30	\$ 100	\$ 74
WA	Richland / Pasco	Benton / Franklin			\$ 94	\$ 59
WA	Seattle	King	October 1	October 31	\$ 202	\$ 74
WA	Seattle	King	November 1	April 30	\$ 157	\$ 74
WA	Seattle	King	May 1	September 30	\$ 202	\$ 74
WA	Spokane	Spokane			\$ 96	\$ 64
WA	Tacoma	Pierce			\$ 112	\$ 64
WA	Vancouver	Clark / Cowlitz / Skamania			\$ 151	\$ 64
WI	Appleton	Outagamie			\$ 92	\$ 64
WI	Brookfield / Racine	Waukesha / Racine			\$ 97	\$ 59
WI	Madison	Dane	October 1	October 31	\$ 127	\$ 59
WI	Madison	Dane	November 1	August 31	\$ 105	\$ 59
WI	Madison	Dane	September 1	September 30	\$ 127	\$ 59
WI	Milwaukee	Milwaukee			\$ 115	\$ 64
WI	Sheboygan	Sheboygan	October 1	May 31	\$ 89	\$ 59
WI	Sheboygan	Sheboygan	June 1	August 31	\$ 94	\$ 59
WI	Sheboygan	Sheboygan	September 1	September 30	\$ 89	\$ 59
WI	Sturgeon Bay	Door	October 1	June 30	\$ 89	\$ 54
WI	Sturgeon Bay	Door	July 1	August 31	\$ 93	\$ 54
WI	Sturgeon Bay	Door	September 1	September 30	\$ 89	\$ 54
WI	Wisconsin Dells	Columbia	October 1	May 31	\$ 92	\$ 59
WI	Wisconsin Dells	Columbia	June 1	September 30	\$ 116	\$ 59
WV	Charleston	Kanawha			\$ 107	\$ 54
WV	Morgantown	Monongalia			\$ 102	\$ 54

WV	Wheeling	Ohio			\$ 119	\$ 54
WY	Cody	Park	October 1	May 31	\$ 102	\$ 64
WY	Cody	Park	June 1	September 30	\$ 139	\$ 64
WY	Evanston / Rock Springs	Sweetwater / Uinta			\$ 97	\$ 59
WY	Gillette	Campbell			\$ 104	\$ 59
WY	Jackson / Pinedale	Teton / Sublette	October 1	May 31	\$ 119	\$ 74
WY	Jackson / Pinedale	Teton / Sublette	June 1	September 30	\$ 179	\$ 74

INTERCITY TRANSIT  
PROCUREMENT POLICY AND PROCEDURES

RESOLUTION 78-86 (10/17/86), as amended by Resolution 5-94 (9/7/94)

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## **ARTICLE 1 - GENERAL PROVISIONS**

### **PART A - PURPOSE AND APPLICATION**

#### **§ 1-101 PURPOSE**

The purpose of this policy is to provide for the fair and equitable treatment of all persons involved in public purchasing by Intercity Transit, to maximize the purchasing value of public funds in procurement, and to provide safeguards for maintaining a procurement system of quality and integrity.

#### **§ 1-102 APPLICATION**

This policy applies to contracts for the procurement of supplies, services and construction, entered into by Intercity Transit after the effective date of this policy unless the parties agree to its application to contracts entered into prior to the effective date. It shall apply to every expenditure of public funds by the agency for public purchasing irrespective of the source of the funds. When the procurement involves the expenditure of Federal assistance or contract funds, the procurement shall be conducted in accordance with any applicable mandatory Federal law and regulations which are not reflected in these procedures. Nothing in these procedures shall prevent Intercity Transit from complying with the terms or conditions of any grant, gift or bequest which are otherwise consistent with law.

### **PART B - DEFINITIONS**

#### **§ 1-201 DEFINITIONS**

Architect - Engineer and Land Surveying Services. These professional services within the scope of the practice of architecture, professional engineering, or land surveying, as defined by the laws of this state.

Blind Trust. An independently managed trust in which the employee-beneficiary has no management rights and in which the employee-beneficiary is not given notice of alterations in, or other dispositions of, the property subject to the trust.

Brand Name or Equal Specification. A specification limited to one or more items by manufacturers' names or catalog numbers to describe the standard of quality, performance, and other salient characteristics needed to meet agency requirements, and which provides for the submission of equivalent products.

Brand Name Specification. A specification limited to one or more items by manufacturers' names or catalog numbers.

Businesses. Any corporation, partnership, individual, sole proprietorship, joint stock company, joint venture or any other private legal entity.

Change Order. A written order signed and issued by the Purchasing Agent, directing the contractor to make changes which the "Changes" clause of the contract authorizes the Purchasing Agent to order without the consent of the contractor.

Contract Modification. Any written alternation in specifications, delivery point, rate of delivery, period of performance, price, quantity, or other provision of any contract accomplished by mutual action of the parties to the contract.



Confidential Information. Any information which is available to an employee only because of the employee's status as an employee of Intercity Transit.

Construction. The process of building, altering, repairing, improving, or demolishing any public structure or building, or other public improvements of any kind to any public real property. It does not include the routine operation, routine repair, or routine maintenance of existing structures, buildings, or real property.

Contract. all types of agency agreements, regardless of what they may be called, for the procurement of supplies, services or construction.

Contractor. Any person having a contract with Intercity Transit.

Cost Analysis. The evaluation of cost data for the purpose of arriving at costs actually incurred or estimates of costs to be incurred, prices to be paid, and costs to be reimbursed.

Cost Data. Factual information concerning the cost of labor, material, overhead, and other cost elements which are expected to be incurred or which have been actually incurred by the contractor in performing the Contract.

Cost-Reimbursement Contract. A contract under which a contractor is reimbursed for costs which are allowable and allocable in accordance with the contract terms and the provisions of these procedures, and a fee or profit, if any.

Direct or Indirect Participation. Involvement through decision, approval, disapproval, recommendation, preparation of any part of a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity.

Disadvantaged Business. A small business which is owned or controlled by a majority of persons, not limited to members of minority groups, who have been deprived of the opportunity to develop and maintain a competitive position in the economy because of social disadvantage.

Employee. An individual drawing a salary or wages from Intercity Transit, whether elected or not, and any non compensated individual performing personal services for Intercity Transit or any department, agency, commission, council, board or any other entity established by the Intercity Transit Authority.

Financial Interest.

- a. Ownership of any interests or involvement in any relationship from which, or as a result of which, a person within the past year has received, or is presently or in the future entitled to receive, more than \$1,000 per year, or its equivalent;
- b. Ownership of 2% of any property or business; or
- c. Holding a position in a business such as an officer, director, trustee, partner, employee, or the like, or holding any position of management.

Gratuity. A payment, loan, subscription, advance, deposit of money, services, or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value is received.

Immediate Family. A spouse, children, parents, brothers and sisters.

Invitation for Bids. All documents, whether attached or incorporated by reference, utilized for soliciting sealed bids.

Legal Counsel. The attorney or attorneys designated by the Authority to provide legal services to Intercity Transit.

Life Cycle Costing. The total cost of an item of work or equipment which is comprised of initial cost, operating costs through the normal or expected life of the item, and salvage or resale price at the end of that normal or expected life.

Micro-purchase. The acquisition of supplies or services in which competition is not required provided that the aggregate amount does not exceed the established micro-purchase threshold.

On-Call Contract. A competitively awarded term contract in which the prequalified supplier(s) may be assigned a task order contract to perform work on an as needed basis in accordance with contract terms.

Persons. Any business, individual, union, committee, club, other organization, or group of individuals.

Price Analysis. The evaluation of price data, without analysis of the separate cost components and profit as in cost analysis, which may assist in arriving at prices to be paid and costs to be reimbursed.

Pricing Data. Factual information concerning prices for items substantially similar to those being procured. Prices in this definition refer to offered or proposed selling prices, historical selling prices and current selling prices. The definition refers to data relevant to both prime and subcontract prices.

Procurement. The buying, renting, leasing, or otherwise acquiring of any supplies, service, or construction. It also includes all functions that pertain to the obtaining of any supply, service, or construction, including description of requirements, selection, and solicitation of sources, preparation and award of contract, and all phases of contract administration.

Qualified Products List. An approved list of supplies, services, or construction items described by model or catalog numbers, which, prior to competitive solicitation, Intercity Transit has determined will meet the applicable specification requirements.

Request for Proposals. All documents, whether attached or incorporated by reference, utilized for soliciting proposals.

Responsible Bidder or Offerer. A person who has the capability in all respects to perform fully the contract requirements, and the tenacity, perseverance, experience, integrity, reliability, capacity, facilities, equipment and credit which will assure good faith performance.

Responsive Bidder. A person who has submitted a bid which conforms in all material respects to the Invitation for Bids.

Services. The furnishing of labor, time or effort by a contractor, not involving the delivery of a specific end product other than reports which are merely incidental to the required performance. This term shall not include employment agreements or collective bargaining agreements.

Small Business. A United States business which is independently owned and which is not dominant in its field of operation or an affiliate or subsidiary of a business dominant in its field of operation.

Specification. Any description of the physical or functional characteristics, or of the nature of a supply, service, or construction. It may include a description of any requirement for inspecting, testing, or preparing a supply, service, or construction item for delivery.

Supplies. All property, including but not limited to equipment, materials, printing, insurance, and leases of real property, excluding land or a permanent interest in land.

## **PART C - PUBLIC ACCESS TO PROCUREMENT INFORMATION**

### **§ 1-301 PUBLIC ACCESS TO PROCUREMENT INFORMATION**

Procurement information shall be public record to the extent provided under the State Public Disclosure Act, RCW 42.56, and shall be available to the public as provided therein.

## **ARTICLE 2 - OFFICE OF THE PURCHASING AGENT**

### **§ 2-101 ESTABLISHMENT**

Establishment of the Position of Purchasing Agent. There is hereby created the position of Purchasing Agent, who shall be Intercity Transit's principal public purchasing official. This position is to be held by the General Manager of Intercity Transit until such time as the Intercity Transit Authority designates otherwise.

### **§ 2-102 AUTHORITY AND DUTIES**

1. Principal Public Purchasing Official. The Purchasing Agent shall serve as the principal public purchasing official for Intercity Transit and shall be responsible for the procurement of supplies, services, and construction in accordance with these procedures, as well as the management and disposal of supplies. The Purchasing Agent shall be authorized to award and execute contracts up to \$25,000, except that the Purchasing Agent may award and execute contracts for general operating supplies, such as diesel fuel, in amounts exceeding \$25,000. This does not preclude governing Authority involvement in any award in which the Authority may deem it appropriate.

2. Duties. In accordance with these procedures, the Purchasing Agent shall:

- a. purchase or supervise the purchasing of all supplies, services and construction needed by Intercity Transit;
- b. exercise direct supervision over all inventories of supplies belonging to Intercity Transit;
- c. sell, trade, or otherwise dispose of surplus supplies belonging to Intercity Transit; and
- d. establish and maintain programs for specifications development, contract administration, and inspection and acceptance.

3. Operating Procedures. Consistent with these Procedures, the Purchasing Agent may adopt operational procedures relating to the execution of its duties.

**§ 2-103 DELEGATION TO OTHER INTERCITY TRANSIT OFFICIALS**

The General Manager may delegate authority to purchase certain supplies, services, or construction items to other Intercity Transit officials, if such delegation is deemed necessary for the effective procurement of those items.

**ARTICLE 3 - SOURCE SELECTION AND CONTRACT FORMATION**

**PART A - METHOD OF SOURCE SELECTION**

**§ 3-101 COMPETITIVE SEALED BIDDING**

1. Conditions for Use. All contracts of Intercity Transit shall be awarded by competitive sealed bidding except as otherwise provided in Section 3-102 (Competitive Sealed Proposals), 3-103 (Small Purchases), 3-104 (Sole Source Procurement), 3-105 (Emergency Procurements), and 5-401 (Public Announcement & Selection Process) of these Procedures.

2. Invitations for Bids. An Invitation for Bids shall be issued and shall include specifications, and all contractual terms and conditions applicable to the procurement.

3. Public Notice. Adequate public notice of the Invitation for Bids shall be given a reasonable time, not less than 15 calendar days, prior to the date set forth therein for the opening of bids. Such notice may include publication in a newspaper of general circulation a reasonable time prior to bid opening. The public notice shall state the place, date and time of bid opening.

4. Bid Opening. Bids shall be opened publicly in the presence of one or more witnesses at the time and place designated in the Invitation for Bids, or as amended by addendum. The amount of each bid, and such other relevant information as the Purchasing Agent deems appropriate, together with the name of each bidder shall be recorded; the record and each bid shall be open to public inspection in accordance with Section 1-301 (Public Access to Procurement Information).

5. Bid Acceptance and Bid Evaluation. Bids shall be unconditionally accepted without alternation or correction, except as authorized in these procedures. Bids shall be evaluated based on the requirements set forth in the Invitation for Bids; which may include criteria to determine acceptability such as inspection, testing, quality, workmanship, delivery, and suitability for a particular purpose. Those criteria that will affect the bid price and be considered in evaluation for award shall be objectively measurable, such as discounts, transportation costs, and total or life cycle costs. The Invitation for Bids shall set forth the evaluation criteria to be used. No criteria may be used in bid evaluations that are not set forth in the Invitation for Bids.

6. Correction or Withdrawal of Bids; Cancellation of Awards. Correction or withdrawal of inadvertently erroneous bids before or after bid opening, or cancellation of awards or contracts based on such bid mistakes, may be permitted where appropriate. Mistakes discovered before bid opening may be modified or withdrawn by written or telegraphic notice received in the office designated in the Invitation for Bids prior to the time set for bid opening.

After bid opening, corrections in bids shall be permitted only to the extent that the bidder can show by clear and convincing evidence that a mistake of a nonjudgemental character was made, the nature of the mistake, and the bid price actually intended. After bid

opening, no changes in bid prices or other provisions of bids prejudicial to the interest of Intercity Transit or fair competition shall be permitted. In lieu of bid correction, a low bidder alleging a material mistake of fact may be permitted to withdraw its bid if:

- a. the mistake is clearly evident on the face of the bid document by the intended correct bid is not similarly evident; or
- b. the bidder submits evidence which clearly and convincingly demonstrates that a mistake was made.

All decisions to permit the correction or withdrawal of bids, or to cancel awards or contract based on bid mistakes, shall be supported by a written determination made by the Purchasing Agent.

7. Award. The contract shall be awarded with reasonable promptness by written notice to the responsible and responsive bidder whose bid meets the requirements and criteria set forth in the Invitation for Bids. In the event all bids for a construction project exceed available funds as certified by the Director of Administrative Services, and the low responsive and responsible bid does not exceed such funds by more than five percent, the Purchasing Agent is authorized, when time or economic considerations preclude re solicitation of work of a reduced scope, to negotiate an adjustment of the bid price with the low responsive and responsible bidder, in order to bring the bid within the amount of available funds. Any such negotiated adjustment shall be based only upon eliminating independent deductive items specified in the Invitation for Bids.

8. Multi-step Sealed Bidding. When it is considered impractical to initially prepare a purchase description to support an award based on price, an Invitation for Bids may be issued requesting the submission of unpriced offers to be followed by an Invitation for bids limited to those bidders whose offers have been determined to be technically acceptable under the criteria set forth in the first solicitation.

### **§ 3-102 COMPETITIVE SEALED PROPOSALS**

1. Conditions for Use. When the Purchasing Agent determines in writing that the use of competitive sealed bidding is either not practicable or not advantageous to Intercity Transit, a contract may be entered into by use of the Competitive Sealed Proposals method.

2. Request for Proposals. Proposals shall be solicited through a Request for Proposals.

3. Public Notice. Adequate public notice of the Request for Proposals shall be given in the same manner as provided in Section 3-101 (3) (Competitive Sealed Bidding, Public Notice); provided, the minimum time shall be 20 calendar days.

4. Receipt of Proposals. No proposals shall be handled so as to permit disclosure of the identity of any offerer or the contents of any proposals to competing offerers during the process of negotiation. A Register of Proposals shall be prepared containing the name of each offerer, the number of modifications received, if any, and a description sufficient to identify the item offered. The Register of Proposals shall be open for public inspection only after contract award.

5. Evaluation Factors. The Request for Proposals shall state relative importance of price and other evaluation factors.

6. Discussion with Responsible Offerers and Revisions to Proposals. As provided in the Request for Proposals, discussion may be conducted with responsible offerers who submit proposals determined to be reasonable susceptible of being selected for award for the purpose of clarification to assure full understanding of, and conformance to, the solicitation requirements.

Offerers shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals and such revisions may be permitted after submissions and prior to award for the purpose of obtaining best and final offers. In conducting discussions, there shall be no disclosure of the identity of competing offerers or of any information derived from proposals submitted by competing offerers.

7. Award. Award shall be made to the responsible offerer whose proposal is determined in writing to be the most advantageous to Intercity Transit taking into consideration price and the other evaluation factors set forth in the Request for Proposals. No other factors or criteria shall be used in the evaluation. The contract file shall contain the basis on which the award is made.

#### **§ 3-103 SMALL PURCHASES**

A micro-purchase not exceeding the Federal Acquisition Regulation (FAR) micro-purchase threshold (currently \$3,500) may be made without competition. Any other contract not exceeding \$10,000 may be made in accordance with small purchase procedures authorized in this section. Contract requirements shall not be artificially divided so as to constitute a micro or small purchase under this Section. Insofar as it is practical, no less than three businesses shall be solicited to submit quotations. Award shall be made to the responsive responsible business submitting the lowest quotation, and the date and amount of each quotation, shall be recorded and maintained as a public record.

#### **§ 3-104 SOLE SOURCE PROCUREMENT**

A contract may be awarded without competition when the Purchasing Agent determines in writing, after conducting a good faith review of available sources that there is only one source for the required supply, service or construction item. The Purchasing Agent shall conduct negotiations, as appropriate, as to price, delivery, and terms. A record of sole source procurements shall be maintained that lists each contractor's name, the amount and type of each contract, a listing of the item(s) procured under each contract, and the identification number of each contract file.

#### **§ 3-105 EMERGENCY PROCUREMENTS**

Notwithstanding any other provisions of these procedures, the Purchasing Agent may make or authorize others to make emergency procurements of supplies, services or construction items when there exists a threat to public health, welfare, or safety; provided that such emergency procurements shall be made with such competition as is practicable under the circumstances. A written determination of the basis for the emergency and for the selection of the particular contractor shall be included in the contract file. As soon as practicable, a record of each emergency procurement shall be made and shall set forth the contractor's name, the amount and type of the contract, a listing of the item(s) procured under the contract, and the identification number of the contract file.

#### **§ 3-106 CANCELLATION OF INVITATIONS FOR BIDS OR REQUESTS FOR PROPOSALS**

An Invitation for Bids, a Request for Proposals, or other solicitation may be canceled, or any or all bids or proposals may be rejected in whole or as may be specified in the solicitation, when it is for good cause and in the best interests of Intercity Transit. The reasons therefore shall be made part of the contract file. Each solicitation issued by Intercity Transit shall state that the solicitation may be canceled and that any bid or proposal may be rejected in whole or in part for good cause when in the best interest of Intercity Transit. Notice of cancellation shall be sent to all businesses solicited. The notice shall identify the solicitation, explain the reasons for cancellation, and, where appropriate, explain that an opportunity will be given to compete on any re solicitation or any future procurements of similar items. Reasons for rejection shall be provided upon request of unsuccessful bidders or offerers.

## **PART B - QUALIFICATIONS AND DUTIES**

### **§ 3-201 RESPONSIBILITY OF BIDDERS AND OFFERERS**

1. Determination of Non responsibility. If a bidder or offerer who otherwise would have been awarded a contract is found non responsible, a written determination of non responsibility setting forth the basis of the finding shall be prepared by the Purchasing Agent. The unreasonable failure of a bidder or offerer to promptly supply information in connection with an inquiry with respect to responsibility may be grounds for a determination of non responsibility with respect to such bidder or offerer. A copy of the determination shall be sent promptly to the non responsible bidder or offerer. The final determination shall be made part of the contract file and be made a public record.

2. Right of Nondisclosure. Information furnished by a bidder or offerer pursuant to this Section shall not be disclosed by Intercity Transit outside the Office of the Purchasing Agent without prior written consent by the bidder or offerer.

### **§ 3-202 COST OR PRICING DATA**

1. Required Submissions Relating to the Award of Contracts. A prospective contractor shall submit cost or pricing data when the contract is expected to exceed \$100,000 and is to be awarded by Competitive Sealed Proposals (Section 3-102), or by Sole Source Procurement authority (Section 3-104).

2. Exceptions. The submission of cost or pricing data relating to the award of a contract is not required where:

- a. the contract price is based on adequate price competition;
- b. the contract price is based on established catalog prices or market prices;
- c. the contract price is set by law or regulation; or
- d. it is determined in writing by the Purchasing Agent that the requirements of Section 3-202 (1) may be waived, and the determination states the reasons for such waiver.

3. Required Submissions Relating to Change Orders or Contract Modifications. A contractor shall submit cost or pricing data prior to the pricing of any change order or contract modification, including adjustments to contracts awarded by Competitive Sealed Bidding, whether or not cost or pricing data were required in connection with the initial pricing of the contract, when the change or modification involves aggregate increases or aggregate decreases in costs plus applicable profits that are expected to exceed \$25,000.

4. Exceptions. The submission of cost or pricing data relating to the pricing of a change order or contract modification is not required where:

- a. unrelated and separately priced adjustments for which cost and pricing data would not be required are consolidated for administrative convenience; or
- b. it is determined in writing by the Purchasing Agent that the requirements of Section 3-202 (3) may be waived, and the determination states the reasons for such waiver.

5. Certification Required. A contractor, actual or prospective, required to submit cost or pricing data in accordance with this Section, shall certify that, to the best of its knowledge and belief, the cost or pricing data submitted was accurate, complete, and current as of a mutually specified date prior to the award of the contract or the pricing of the change order or contract modification.

6. Price Adjustment Provision Required. Any contract award, change order, or contract modification under which the submission and certification of cost or pricing data are required shall contain a provision stating that the price to Intercity Transit, including profit or fee, shall be adjusted to exclude any significant sums by which Intercity Transit finds that such price was increased because the contractor-furnished cost or pricing data was inaccurate, incomplete, or not current as of the date agreed upon between Intercity Transit and the contractor.

#### **§ 3-203 COST OR PRICE ANALYSIS**

A cost analysis or a price analysis, as appropriate, shall be conducted prior to award of the contract other than one awarded under Section 3-101 (Competitive Sealed Bidding). In the event that only a single bid is received from a competitive sealed bidding process, the Purchasing Agent shall perform a cost or price analysis. Award shall not be considered until after the completion of said cost or price evaluation and the written determination by the Purchasing Agent that the single bid received is fair and reasonable. A written record of such cost analyses or price analyses shall be made a part of the contract file.

#### **§ 3-204 BID AND PERFORMANCE BONDS ON SUPPLY OR SERVICE CONTRACTS**

Bid and performance bonds or other security may be requested for supply contracts or service contracts as the Purchasing Agent deems advisable to protect Intercity Transit's interests. Any such bonding requirements shall be set forth in the solicitation. Bid or performance bonds shall not be used as a substitute for a determination of a bidder or offerer's responsibility.

### **PART C - TYPES OF CONTRACTS AND CONTRACT ADMINISTRATION**

#### **§ 3-301 TYPES OF CONTRACTS**

1. General Authority. Subject to the limitations of this Section, any type of contract which is appropriate to the procurement and which will promote the best interest of Intercity Transit may be used; provided that the use of a cost-plus-a-percentage-of-cost contract or a cost-plus-a-percentage-of-construction-cost contract are prohibited. A cost reimbursement contract may be used only when a determination is made in writing that such contract is likely to be less costly to Intercity Transit than any other type or that it is impractical to obtain the supply, service, or construction item required except under such a contract. An on-call contract may be used provided that each task order contract includes a written determination that it



would not be practical or cost effective to conduct a standalone procurement for the work to be performed.

2. Multi-term Contracts.

- a. Specified Period. Unless otherwise provided by law, a contract for supplies or services may be entered into for any period of time deemed to be in the best interests of Intercity Transit provided the term of the contract and conditions of renewal or extension, if any, are included in the solicitation and funds are available for the first fiscal period at the time of contracting. Payment and performance obligations for succeeding fiscal periods shall be subject to the availability and appropriation of funds therefor.
- b. Determination Prior to Use. Prior to the utilization of a multi-term contract, it shall be determined in writing:
  - (i) that estimated requirements cover the period of the contract and are reasonably firm and continuing; and
  - (ii) that such a contract will serve the best interests of Intercity Transit by encouraging effective competition or otherwise promoting economies in Intercity Transit procurement.
- c. Cancellation Due to Unavailability of Funds in Succeeding Fiscal Periods. When funds are not appropriated or otherwise made available to support continuation of performance in a subsequent fiscal period, the contract shall be canceled and the contractor shall be reimbursed for the reasonable value of any non-recurring costs incurred but not amortized in the price of the supplies or services delivered under the contract. The cost of cancellation may be paid from any appropriations available for such purposes.

**§ 3-302 CONTRACT CLAUSES AND THEIR ADMINISTRATION**

1. Contract Clauses. All Intercity Transit contracts for supplies, services, and construction shall include provisions necessary to define the responsibilities and rights of the parties to the contract. The Purchasing Agent, after consultation with Legal Counsel, may issue clauses appropriate for supply, service, or construction contracts, addressing among others the following subjects:

- a. the unilateral right of Intercity Transit to order in writing changes in the work within the scope of the contract;
- b. the unilateral right of Intercity Transit to order in writing temporary stopping of work or delaying performance that does not alter the scope of the contract;
- c. variations occurring between estimated quantities of work in contract and actual quantities;
- d. defective pricing;
- e. liquidated damages;
- f. specified excuses for delay or nonperformance;
- g. termination of the contract for default;

- h. termination of the contract in whole or in part for the convenience of Intercity Transit;
  - i. suspension of work on a construction project order by Intercity Transit; and
  - j. site conditions differing from those indicated in the contract, or ordinarily encountered, except that a differing site conditions clause need not be included in a contract:
    - (i) when the contract is negotiated;
    - (ii) when the contractor provides the site or design; or
    - (iii) when the parties have otherwise agreed with respect to the risk of differing site conditions.
2. Price Adjustments
- a. Adjustments in price resulting from the use of contract clauses required by Subsection (1) of this Section shall be computed in one or more of the following ways:
    - (i) by agreement on a fixed price adjustment before commencement of the pertinent performance or as soon thereafter as practicable;
    - (ii) by unit prices specified in the contract or subsequently agreed upon;
    - (iii) by the costs attributable to the events or situations under such clauses with adjustment of profit or fee, all as specified in the contract or subsequently agreed upon;
    - (iv) in such other manner as the contracting parties may mutually agree; or
    - (v) in the absence of agreement by the parties, by a unilateral determination by Intercity Transit of the costs attributable to the events or situations under such clauses, with adjustment of profit or fee as computed by Intercity Transit, as accounted for in accordance with cost principles which are codified in subpart 1-15 of Title 41, Code of Federal Regulation and subject to the provisions of Article 9 (Appeals and Remedies).
  - b. A contractor shall be required to submit cost or pricing data if any adjustment in contract price is subject to the provisions of Section 3-202 (Cost or Pricing Data).

3. Standard Clauses and Their Modification. The Purchasing Agent, after consultation with Legal Counsel, may establish standard contract clauses for use in Intercity Transit contracts. If the Purchasing Agent establishes any standard clauses addressing the subjects set forth in Subsection (1) of this Section, such clauses may be varied provided that any variations are supported by a written determination that states the circumstances justifying such variations.

**§ 3-303 COST REIMBURSEMENT PROVISIONS**

Cost reimbursement provisions shall only obligate Intercity Transit to reimburse reasonable costs, allocable to the contractor, either directly or indirectly, that are accounted for subject to appropriate Federal cost principles, which are codified in Subpart 1-15 of Title 41, Code of Federal Regulations.

**§ 3-304 APPROVAL OF ACCOUNTING SYSTEM**

Except with respect to firm fixed-price contracts, no contract type shall be used unless it has been determined in writing by the Purchasing Agent that:

- a. the proposed contractor's accounting system will permit timely development of all necessary cost data in the form required by the specific contract type contemplated; and
- b. the proposed contractor's accounting system is adequate to allocate cost in accordance with generally accepted accounting principles.

**§ 3-305 RIGHT TO INSPECT PLANT**

Intercity Transit shall reserve the right, where appropriate, to inspect, at reasonable times, the part of the plant, place of business, or worksite of a contractor or subcontractor at any tier which is pertinent to the performance of any contract awarded or to be awarded by Intercity Transit.

**§ 3-306 RIGHT TO AUDIT RECORDS**

1. **Audit of Cost or Pricing Data.** Intercity Transit shall reserve the right to, at reasonable times and places, audit the books and records of any contractor who has submitted costs or pricing data pursuant to Section 3-202 (Cost or Pricing Data) to the extent that such books, documents, papers, and records are pertinent to such cost or pricing data. Any person who receives a contract, change order, or contract modification for which cost or pricing data is required, shall maintain such books, documents, papers and records that are pertinent to such cost or pricing data for three years from the date of final payment or the resolution of any disputes under the contract.

2. **Contract Audit.** Intercity Transit shall reserve the right to audit the books and records of a contractor or a subcontractor at any tier under any negotiated contract or subcontract other than a firm fixed-price contract to the extent that such books, documents, papers and records are pertinent to the performance of such contract or subcontract. Such books and records shall be maintained by the contractor for a period of three years from the date of final payment or the resolution of any disputes under the prime contract and by the subcontractor for a period of three years from the date of final payment or the resolution of any disputes under the subcontract.

**§ 3-307 REPORTING OF ANTICOMPETITIVE PRACTICES**

When, for any reason, collusion or other anticompetitive practices are suspected among any bidders or offerers, a notice of the relevant facts shall be transmitted to the State Attorney General.

**§ 3-308 INTERCITY TRANSIT PROCUREMENT RECORDS**

1. **Contract File.** All determinations and other written records pertaining to the solicitation, award, or performance of a contract shall be maintained for Intercity Transit in a contract file by the Purchasing Agent.

2. **Retention of Procurement Records.** All procurement records shall be retained and disposed of by Intercity Transit in accordance with records retention guidelines and schedules required by State Law. If a contract is being funded in whole or in part by assistance from a Federal agency, then all procurement records pertaining to that contract shall be maintained for three years from the close-out date of the assistance agreement or the final disposition of any controversy arising out of the assistance agreement.

## **ARTICLE 4 - SPECIFICATIONS**

### **§ 4-101 MAXIMUM PRACTICABLE COMPETITION**

All specifications shall be drafted so as to promote overall economy for the purposes intended and encourage maximum free and open competition in satisfying Intercity Transit's minimum needs, and shall not be unduly restrictive. The policy enunciated in this Section applies to all specifications including but not limited to, those prepared for Intercity Transit by architects, engineers, designers, and draftsmen.

### **§ 4-102 QUALIFIED PRODUCTS LISTS**

(Reserved)

### **§ 4-103 BRAND NAME OR EQUAL SPECIFICATIONS**

1. Use. Brand name or equal specifications may be used when the Purchasing Agent determines in writing that:
  - a. no other design or performance specification or qualified products list is available;
  - b. time does not permit the preparation of another form or purchase description, not including a brand name specification;
  - c. the nature of the product or the nature of Intercity Transit's requirements makes use of a brand name or equal specification suitable for the procurement; or
  - d. use of brand name or equal specification is in Intercity Transit's best interest.
2. Designation of Several Brand Names. Brand name or equal specifications shall seek to designate three, or as many different brands as are practicable, as "or equal" references and shall further state that substantially equivalent products to those designated will be considered for award.
3. Required Characteristics. Unless the purchasing agent determines in writing that the essential characteristics of the brand names included in the specifications are commonly known in the industry or trade, brand name or equal specifications shall include a description of the particular design, function, or performance characteristics which are required.
4. Nonrestrictive Use of Brand Name or Equal Specifications. Where a brand name or equal specification is used in a solicitation, the solicitation shall contain explanatory language that the use of a brand name is for the purpose of describing the standard of quality, performance, and characteristics desired and is not intended to limit or restrict competition.
5. Further Requirements. No specification for bids or statement of work in connection with such works shall be written in such a manner as to contain proprietary, exclusionary, or discriminatory requirements other than those based upon performance, unless such requirements are necessary to test or demonstrate a specific thing or to provide for necessary interchangeability of parts or equipment, or at least two brand names or trade names of comparable quality or utility are listed and are followed by the words "or equals".

### **§ 4-104 BRAND NAME SPECIFICATION**

1. Use. Since use of a brand name specification is restrictive of product competition, it may be used only when the Purchasing Agent makes a written determination that only the identified brand name item or items will satisfy Intercity Transit's needs.

2. Competition. The Purchasing Agent shall seek to identify sources from which the designated brand name item or items can be obtained and shall solicit such sources to achieve whatever degree or price competition is practicable. If only one source can supply the requirement, the procurement shall be made under Section 3-104 (Sole Source Procurement).

## **ARTICLE 5 - PROCUREMENT OF CONSTRUCTION, ARCHITECT-ENGINEER AND LAND SURVEYING SERVICES**

### **PART A - MANAGEMENT OF CONSTRUCTION CONTRACTING**

#### **§ 5-101 RESPONSIBILITY FOR SELECTION OF METHODS OF CONSTRUCTION CONTRACTING MANAGEMENT**

The Purchasing Agent shall have discretion to select the appropriate method of construction contracting management for a particular project. In determining which method to use, the Purchasing Agent shall consider Intercity Transit's requirements, its resources, and the potential contractor's capabilities. The Purchasing Agent shall execute and include in the contract file a written statement setting forth the facts which led to the selection of a particular method of construction contracting management for each project.

#### **§ 5-102 CONTRACT ADMINISTRATION**

The Purchasing Agent shall maintain a contract administration system designed to insure that a contractor is performing in accordance with the solicitation under which the contract was awarded, and the terms and conditions of the contract.

### **PART B - BID SECURITY AND PERFORMANCE BONDS**

#### **§ 5-201 BID SECURITY**

1. Requirement for Bid Security. Bid security shall be required for all competitive sealed bidding for construction contracts when the price is estimated by the Purchasing Agent to exceed \$100,000. bid security shall be a bond provided by a surety company authorized to do business in this state, or the equivalent in cash, or otherwise supplied in a form satisfactory to Intercity Transit. Nothing herein prevents the requirement of such bonds on construction contracts under \$100,000 when the circumstances warrant.

2. Amount of Bid Security. Bid security shall be in an amount equal to at least 5% of the amount of the bid.

3. Rejection of Bids for Noncompliance with Bid Security Requirements. When the Invitation for Bids requires security, noncompliance requires that the bid be rejected unless it is determined that the bid fails to comply in a non-substantial manner with the security requirements.

4. Withdrawal of Bids. If a bidder is permitted to withdraw its bid before award as provided in Section 3-101 (6), no action shall be had against the bidder or the bid security.

#### **§ 5-202 CONTRACT PERFORMANCE AND PAYMENT BONDS**

1. When Required - Amounts. When a construction contract is awarded in excess of \$25,000, the following bonds or security shall be delivered to Intercity Transit and shall become binding on the parties upon the execution of the contract:

- a. a performance bond satisfactory to Intercity Transit, executed by a surety company authorized to do business in this state or otherwise secured in a manner satisfactory to Intercity Transit, in an amount equal to 100% of the price specified in the contract; and
- b. a payment bond satisfactory to Intercity Transit, executed by a surety company authorized to do business in this state or otherwise secured in a manner satisfactory to Intercity Transit, for the protection of all persons supplying labor and material to the contractor or its subcontractors for the performance of the work provided for in the contract. The bond shall be in an amount equal to 100% of the price specified in the contract.

2. Reduction of Bond Amounts. After notice to the Authority, the Purchasing Agent is authorized to reduce the amount of performance and payment bonds to fifty percent of the contract price for each bond when a written determination is made that it is in the best interests of Intercity Transit to do so, except where not allowed by a State or Federal project funding source.

3. Authority to Require Additional Bonds. Nothing in this Section shall be construed to limit the authority of Intercity Transit to require a performance bond or other security in addition to those bonds, or in circumstances other than specified in Subsection (1) of this Section.

#### **§ 5-203 COPIES OF BOND FORMS**

Any person may request and obtain from Intercity Transit a certified copy of bond upon payment of the cost of reproduction of the bond and postage, if any. A certified copy of a bond shall be prima facie evidence of the contents, execution, and delivery of the original.

### **PART C - FISCAL RESPONSIBILITY**

#### **§ 5-301 FISCAL RESPONSIBILITY**

Every contract modification, change order, or contract price adjustment under a construction contract with Intercity Transit in excess of \$10,000 shall be subject to prior approval by the Authority after receiving a report from the Purchasing Agent as to the effect of the contract modification, change order, or contract price adjustment on the total project budget or the total contract budget.

### **PART D - ARCHITECT-ENGINEER AND LAND SURVEYING SERVICES**

#### **§ 5-401 PUBLIC ANNOUNCEMENT AND SELECTION PROCESS**

1. Public Announcement. It is the policy of Intercity Transit to publicly announce all requirements for architecture-engineer and land surveying services and to negotiate such contracts on the basis of demonstrated competence and qualifications at fair and reasonable prices. In the procurement of architect-engineer and land surveying services, the Purchasing Agent shall request firms to submit a statement of qualifications and performance data.

2. Selection Process. The Purchasing Agent shall conduct discussions with no less than three firms regarding the contract and shall select from among them no less than three of

the firms deemed most qualified to provide the required services. The selection shall be made in order of preference, based on criteria established and published by the Purchasing Agent.

3. Negotiation. The Purchasing Agent shall negotiate a contract with the highest qualified firm for architect-engineer or land surveying services at compensation which the Purchasing Agent determines in writing to be fair and reasonable to Intercity Transit. In making this decision, the Purchasing Agent shall take into account the estimated value, the scope, the complexity, and the professional nature of the services to be rendered. Should the Purchasing Agent be unable to negotiate a satisfactory contract with the firm considered to be the most qualified at a price the Purchasing Agent determines to be fair and reasonable to Intercity Transit, negotiations with that firm shall be formally terminated. The Purchasing Agent shall then undertake negotiations with the second most qualified firm. Failing accord with the second most qualified firm, the Purchasing Agent shall formally terminate negotiations. The Purchasing Agent shall then undertake negotiations with the third most qualified firm. Should the Purchasing Agent be unable to negotiate a contract at a fair and reasonable price with any of the selected firms, the Purchasing Agent shall select additional firms in order of their competence and qualifications, and the Purchasing Agent shall continue negotiations in accordance with this Section until an agreement is reached.

## **ARTICLE 6 - DEBARMENT OR SUSPENSION**

### **§ 6-101 AUTHORITY TO DEBAR OR SUSPEND**

After reasonable notice to the person involved and reasonable opportunity for that person to be heard, the Purchasing Agent, after consulting with legal counsel, is authorized to debar a person for cause from consideration for award of contracts. The debarment shall not be for a period of more than three years. After consultation with legal counsel, the Purchasing Agent is authorized to suspend a person from consideration for award of contracts if there is probable cause to believe that the person has engaged in any activity which might lead to debarment. The suspension shall not be for a period exceeding three months. The causes for debarment include:

- a. conviction for commission of a criminal offense as an incident to obtaining or attempting to obtain a public or private contract or subcontract, or in the performance of such contract or subcontract;
- b. conviction under state and Federal statutes of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, or any other offense indicating a lack of business integrity or business honesty which currently, seriously, and directly affects responsibility as a Intercity Transit contractor;
- c. conviction under state or Federal antitrust statutes arising out of the submission of bids or proposals;
- d. violation of contract provisions, as set forth below, of a character which is regarded by the Purchasing Agent to be so serious as to justify debarment action:
  - (i) deliberate failure without good cause to perform in accordance with the specifications or within the time limit provided in the contract; or
  - (ii) a recent record of failure to perform or of unsatisfactory performance in accordance with the terms of one or more contracts; provided that failure

to perform or unsatisfactory performance caused by acts beyond the control of the contractor shall not be considered to be a basis for debarment.

- e. any other cause the Purchasing Agent determines to be so serious and compelling as to affect responsibility as an Intercity Transit contractor, including debarment by another governmental entity for any cause listed in the policy; and
- f. for violation of the ethical standards set forth in Article 9 (Ethics in Public Contracting).

#### **§ 6-102 DECISION TO DEBAR OR SUSPEND**

The Purchasing Agent shall issue a written decision to debar or suspend. The decision shall state the reason for the action taken and inform the debarred or suspended person involved of its rights concerning judicial or administrative review.

#### **§ 6-103 NOTICE OF DECISION**

A copy of the decision required by Section 6-102 (Decision to Debar or Suspend) shall be mailed or otherwise furnished immediately to the debarred or suspended person.

#### **§ 6-104 FINALITY OF DECISION**

A decision under Section 6-102 (Decision to Debar or Suspend) shall be final and conclusive, unless fraudulent, or the debarred or suspended person within ten days after receipt of the decision takes an appeal to the Intercity Transit Authority or commences a timely action in court in accordance with applicable law.

### **ARTICLE 7 - APPEALS AND REMEDIES**

#### **§ 7-101 BID PROTESTS**

1. Right to Protest. Any actual or prospective bidder, offerer, or contractor who is aggrieved in connection with the solicitation or award of a contract shall file a protest with the Purchasing Agent. A protest with respect to an Invitation for Bids or Request for Proposals shall be submitted in writing prior to the opening of bids or the closing date for proposals unless the aggrieved person did not know and should not have known of the facts giving rise to such protest prior to bid opening or the closing date for proposals. The protest shall be submitted within seven calendar days after such aggrieved person knows or should have known of the facts giving rise thereto. If the protester is not satisfied with the solution of the Purchasing Agent, a written protest may be filed with the Authority. Protests filed more than seven calendar days following the receipt of the Purchasing Agent's written determination will not be accepted.
2. Stay of Procurements During Protests. In the event of a timely protest under subsection 1 of this Section, the Purchasing Agent shall not proceed further with the solicitation or award of the contract until all administrative and judicial remedies have been exhausted or until the Authority makes a determination on the record that the award of a contract without delay is necessary to protect substantial interests of Intercity Transit.
3. Entitlement to Costs. In addition to any other relief, when a protest is sustained and the protesting bidder or offerer should have been awarded the contract under the solicitation, but is not, then the protesting bidder or offerer shall be entitled to the



reasonable costs incurred in connection with the solicitation, including bid preparation costs, other than attorney's fees.

**§ 7-102 CONTRACT CLAIMS**

1. Decision of the Purchasing Agent. All claims by a contractor against Intercity Transit relating to a contract, except bid protest, shall be submitted in writing to the Purchasing Agent for a decision. Claims include, without limitation, controversies arising under a contract, and those based upon breach of contract, mistake, misrepresentation, or other cause for contract modification or rescission.

2. Notice to the Contractor of the Purchasing Agent's Decision. The decision of the Purchasing Agent shall be promptly issued in writing, and shall be immediately mailed or otherwise furnished to the contractor. The decision shall state the reasons for the decision reached, and shall inform the contractor of its appeal rights under Subsection 3 of this Section.

3. Finality of Purchasing Agent's Decision; Contractor's Right of Appeal. The Purchasing Agent's decision shall be final and conclusive unless, within seven calendar days from the date of receipt of the decision, the contractor mails or otherwise delivers a written appeal to the Intercity Transit Authority or commences an action in a court of competent jurisdiction.

4. Failure to Render a Timely Decision. If the Purchasing Agent does not issue a written decision regarding any contract controversy within seven days after written request for a final decision, or within such longer period as may be agreed upon between the parties, then the aggrieved party may proceed as if an adverse decision had been received.

**§ 7-103 ACCESS TO LOCAL COURTS**

(Reserved)

**§ 7-104 ACCESS TO STATE COURTS**

(Reserved)

**§ 7-105 AUTHORITY OF THE PURCHASING AGENT TO SETTLE BID PROTESTS AND CONTRACT CLAIMS**

The Purchasing Agent is authorized to settle any protest regarding the solicitation or award of an Intercity Transit contract, or any claim arising out of the performance of an Intercity Transit contract, prior to an appeal to the Authority or the commencement of an action in a court of competent jurisdiction.

**§ 7-106 REMEDIES FOR SOLICITATIONS OR AWARDS IN VIOLATION OF LAW**

1. Prior to Bid Opening or Closing Date for Receipt of Proposals. If prior to bid opening or the closing date for receipt of proposals, the Purchasing Agent, after consultation with legal counsel, determines that a solicitation is in violation of Federal, State or municipal law, then the solicitation shall be canceled or revised to comply with applicable law.

2. Prior to Award. If after bid opening or the closing date for receipt of proposals, the Purchasing Agent, after consultation with legal counsel, determines that a solicitation or a proposed award is in violation of Federal, State or municipal law, then the solicitation or proposed award shall be canceled.

3. After Award. If, after an award, the Purchasing Agent, after consultation with legal counsel, determines that a solicitation or award of a contract was in violation of applicable law, then:

- a. if the person awarded the contract has not acted fraudulently or in bad faith:
  - (i) the contract may be ratified and affirmed, provided it is determined that so doing is in the best interest of Intercity transit, or
  - (ii) the contract may be terminated and the person awarded the contract shall be compensated for the actual expenses reasonably incurred under the contract, plus a reasonable profit, prior to the termination.
- b. if the person awarded the contract has acted fraudulently or in bad faith, the contract may be declared null and void or voidable, if such action is in the best interests of Intercity Transit.

## **ARTICLE 8 - ASSISTANCE TO WOMEN AND MINORITY BUSINESS ENTERPRISES**

### **§ 8-101 SOLICITATION OF WOMEN AND MINORITY BUSINESSES**

The Purchasing Agent shall implement procedures to seek involvement by Women and Minority Businesses in Intercity Transit's procurement process.

Examples of procedures that may achieve that involvement may include:

- a. including qualified small, women-owned, and minority businesses on solicitation lists;
- b. assuring that small, women-owned, and minority businesses are solicited whenever they are potential sources;
- c. when economically feasible, dividing total requirements into small tasks or quantities so as to permit maximum small, women-owned, and minority business participation;
- d. where the requirement permits, establishing delivery schedules which will encourage participation by small, women-owned, and minority businesses.

## **ARTICLE 9 - ETHICS IN PUBLIC CONTRACTING**

### **§ 9-101 CRIMINAL PENALTIES**

To the extent that violations of the ethical standards of conduct set forth in this Part constitute violations of the State Criminal Code, they shall be punishable as provided therein. Such penalties shall be in addition to the civil sanctions set forth in this Part. Criminal, civil, and administrative sanctions set forth in this Part. Criminal, civil, and administrative sanctions against employees or non-employees which are in existence on the effective date of this policy shall not be impaired.

### **§ 9-102 EMPLOYEE CONFLICT OF INTEREST**

Intercity Transit shall not purchase goods or services from any business:

- a. owned by an Intercity Transit Authority member or employee with purchasing authority at any level, or

- b. owned by such Authority member's or employee's spouse, dependent children and other dependent relatives, if living in the household.

Failure of an employee to disclose such an interest prior to the conduct of a prohibited purchasing action shall constitute a basis for consideration of sanctions as defined in Section 9-108.

It shall be unethical and not allowed for any employee to participate directly or indirectly in a procurement when the employee knows that:

- a. the employee or any member of the employee's immediate family has a financial interest pertaining to the procurement; or
- b. any other person, business, or organization with whom the employee or any member of an employee's immediate family is negotiating or has an arrangement concerning prospective employment is involved in the procurement.

An employee or any member of any employee's immediate family who holds a financial interest in a disclosed blind trust shall not be deemed to have a conflict of interest with regard to matters pertaining to that financial interest.

#### **§ 9-103 GRATUITIES AND KICKBACKS**

1. Gratuities. It shall be unethical for any person to offer, give or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter, pertaining to any program requirement or a contract or subcontract, or to any solicitation or proposal therefor.

2. Kickbacks. It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.

3. Contract Clause. The prohibition against gratuities and kickbacks prescribed in this Section shall be conspicuously set forth in every contract and solicitation.

#### **§ 9-104 PROHIBITION AGAINST CONTINGENT FEES**

It shall be unethical for a person to be retained, or to retain a person, to solicit or secure an Intercity Transit contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except for retention of bona fide employees or bona fide established commercial selling agencies for the purpose of securing business.

#### **§ 9-105 CONTEMPORANEOUS EMPLOYMENT PROHIBITED**

It shall be unethical for any employee who is participating directly or indirectly in the procurement process to become or to be, while such an employee, the employee of any person contracting with the governmental body by whom the employee is employed.

**§ 9-106 WAIVERS FROM CONTEMPORANEOUS EMPLOYMENT PROHIBITION AND OTHER CONFLICT OF INTEREST**

The Authority may grant a waiver from the employee conflict of interest provision (Section 9-102) or the contemporaneous employment provision (Section 9-105) upon making a written determination that:

- a. the contemporaneous employment or financial interest of the Intercity Transit employee has been publicly disclosed;
- b. the Intercity Transit employee will be able to perform his or her procurement function without actual or apparent bias or favoritism; and
- c. the award will be in the best interests of Intercity Transit.

**§ 9-107 USE OF CONFIDENTIAL INFORMATION**

It shall be unethical for any employee or former employee knowingly to use confidential information for actual or anticipated personal gain, or for the actual or anticipated personal gain for any other person.

**§ 9-108 SANCTIONS**

1. Employees. The Authority or the General Manager may impose any one or more of the following sanctions on an employee for violations of the ethical standards in this Part:

- a. oral or written warnings or reprimands;
- b. suspension with or without pay for specified periods of time; or
- c. termination of employment.

2. Nonemployees. The Authority may impose any one or more of the following sanctions on a nonemployee for violations of the ethical standards:

- a. written warnings or reprimands;
- b. termination of contracts; or
- c. debarment or suspension as provided in Section 6-101.

**§ 9-109 RECOVERY OF VALUE TRANSFERRED OR RECEIVED IN BREACH OF ETHICAL STANDARDS**

1. General Provisions. The value of anything transferred or received in breach of the ethical standards of these procedures by an employee or a nonemployee may be recovered from both employee and non-employee.

2. Recovery of Kickbacks by Intercity Transit. Upon a showing that a subcontractor made a kickback to a prime contractor or a higher tier subcontractor in connection with the award of a subcontract or order thereunder, it shall be conclusively presumed that the amount thereof was included in the price of the subcontract or order and ultimately borne by Intercity Transit and will be recoverable hereunder from the recipient. In addition, that amount may also be recovered from the subcontractor making such kickbacks. Recovery from one offending party shall not preclude recovery from other offending parties.

<p align="center"><b>GUIDELINES FOR ETHICAL CONDUCT</b></p>	<p><b>Date:</b> May 4, 1994  <b>Revised:</b> January 21, 1997  June 19, 2009</p>
<p><b>Subject:</b> Acceptance of Gifts and Gratuities</p> <p><b>Applicability:</b> All Employees and Authority Members</p>	<p align="center"><b>No. 94-1</b></p>

The following Guidelines for Ethical Conduct are based on the Intercity Transit Procurement Policy on Gratuities and Kickbacks, Article 9-207.

*Intent:*

**Recognizing the need for all individuals involved in procurements for a public agency to remain independent, free from obligation, and above suspicion, the intent of these guidelines is to avoid positions of conflicting interests for Intercity Transit employees. Further, the definitions and clarification of acceptable practices will help Intercity Transit employees make informed decisions regarding gifts and gratuities.**

*Statement of Conduct:*

No employee or Authority member of Intercity Transit shall accept or receive, directly or indirectly, a personal financial benefit or gratuity as a result of a potential purchase, or a purchase entered into by Intercity Transit, from any person, firm, or corporation engaged in the sale, lease, or rental of property, material, supplies, equipment, commodities, or services to Intercity Transit.

*Definitions and Acceptable Practices:*

Gratuity or Benefit

Gratuity or benefit is defined as a payment, loan, subscription, advance, deposit of money, or anything else of more than nominal value present or promised.

Nominal Value

Nominal value is defined as \$25.00 or less cumulative value of items offered over the course of one year. Items in the nominal category are generally limited to vendor promotional items such as: baseball caps, calendars, coffee mugs, pads, and pens. Although these items may be accepted, employees shall refrain from the display of promotional materials which might suggest or create the perception of undue vendor influence.

### Meals

Meals received from vendors or potential vendors are subject to the *Statement of Conduct* and definitions for Gratuity and Nominal Value addressed previously.

### Obligation

Above all, the nominal items or meals addressed above shall not create, or appear to create, a sense of obligation on the part of the recipient toward the person or firm that is the source.

### Catalogs, Samples, and Trade Shows

Intercity Transit employees may accept reference catalogs, product samples for documented testing, and admissions to trade shows, provided they foster the best interest of Intercity Transit and are of no economic gain to the individual.

### Gifts Exceeding Nominal Value

Gifts offered exceeding nominal value should be refused and returned with a polite explanation. Perishable gifts offered exceeding nominal value should either be returned or donated to a local charity in the name of the supplier. All gifts received with a value in excess of \$25.00 shall be reported on a gifts and gratuities report form. The method of disposal or method used in returning the item shall be documented on the form.

### ***Enforcement:***

As delegated by the General Manager/Purchasing Agent, the Development Director shall be responsible for monitoring the overall ethical purchasing practices of Intercity Transit. This shall include a review of the gifts and gratuities reports and the investigation of departmental purchasing standards and practices as necessary.

The Development Director shall investigate compliance with agency purchasing policies and practices, in cooperation with the Human Resources Director. If necessary, a written recommendation to impose employee sanctions shall be provided to the General Manager.

The General Manager will be responsible for presenting the findings and recommendations for employee sanctions to the Director of the department employing the violating employee. Additionally, the General Manager shall be responsible for the implementation and monitoring of imposed sanctions, unless he/she chooses to delegate the responsibility.

Each Department Director shall be responsible for maintaining and monitoring the ethical purchasing practices of his/her department.

If an employee becomes aware of the acceptance of a gift or gratuity in violation of the Intercity Transit policy, notice shall be given to their immediate supervisor, their Department Director or the General Manager.

***Penalties:***

Violations of these Guidelines are subject to penalties under the Intercity Transit Procurement Policy, Article 9-212, Sanctions, and the Intercity Transit Human Resources Rules.

***Offer Evaluation and Assistance:***

Those employees of Intercity Transit in a position to influence the purchasing process must avoid any activity which may diminish, or even appear to diminish, the objectivity of Intercity Transit's purchasing decision-making process.

Extreme caution must be used in evaluating the intent and the perception of accepting any gifts, even if of nominal value. The frequency of such actions and the collective impact should also be considered.

*Questions to ask when evaluating any offer from a vendor or potential vendor:*

1. Is it legal?
2. Is it in the best interest of Intercity Transit to participate in such activity?
3. Will the acceptance of an offer influence future buying decisions?
4. Will the acceptance of the offer be perceived as influencing buying decisions?

**The employees of Intercity Transit are charged with the responsibility of evaluating vendor offers in light of Intercity Transit Procurement Policies and Procedures and the Guidelines for Ethical Conduct. If employees desire assistance in evaluating a vendor offer, they should contact their immediate supervisor or the Development Director.**

**Resources used to formulate Purchasing Procedure 94-1:**

Organizational Contacts:

1. Sally Bashar, Tri-Met, Portland, Oregon
2. Carlton Chayer, City of Portland, Portland, Oregon

<b>PROCUREMENT PROCEDURES</b>	Revision Number: <b>95-1</b>
Subject: Ethics/Conflict of Interest Monitoring Applicability: All purchases	Date: March 1, 1995

## 1. PROGRAM

Implementation procedures to address newly adopted "conflict of interest" policy and other, related, ethics guidelines.

## 2. ACTIVITIES

- Each January, the General Manager will issue a reminder of Intercity Transit's Ethics Policy and Guidelines to all Authority members and employees with purchasing authority .
- Each January, all Authority members and any employee with purchasing authority at any level are to file an annual statement with the General Manager acknowledging their familiarity with Intercity Transit's Ethics Policy and Guidelines, and to update a disclosure form which identifies any interest or action taken which would contravene the objectives of the policy or constitute an actual or potential conflict of interest.
- Disclosure statements are to be updated by the affected Authority member or employee within 30 days of any substantial change.
- Management personnel shall identify to Procurement staff all employees under them who are required by this procedure to report.
- Procurement staff will create, and distribute internally, a listing of any businesses identified as being owned by an Authority member or employee with purchasing authority at any level, and any business identified as being owned by such Authority member's or employee's spouse, dependent children and other dependent relatives, if living in the household. The Procurement Policy Resolution prohibits Intercity Transit from purchasing goods or services from any such business.
- Accounting staff will monitor purchase order activity to avoid issuance of purchase orders to firms identified from the above listing of businesses.

## 3. VIOLATIONS

Violations of Intercity Transit's Ethics Policy and Guidelines are subject to sanctions identified in the Procurement Policy Resolution, Section 9-108.



<b>PROCUREMENT PROCEDURES</b>	Revision Number: <b>95-2</b>
Subject: Ethics/Conflict of Interest Policy Distribution and Collection Procedure Applicability: All Authority Members and Employees with purchasing authority.	Date: March 10, 1995

1. Each January Procurement staff reviews the "Signature Authorization Listing for Purchase Orders" maintained by Accounting. This document identifies internal procurement authority and is the basis for the distribution list for employee Ethics documents.
2. Procurement prepares ethics documents for the Authority and those employees identified on the Signature Authorization Listing. The ethics document packets will include:
  - Guidelines for Ethical Conduct No. 94-1
  - Conflict of Interest Monitoring No. 95-1
  - Article 9 - Ethics in Public Contracting, from the Procurement Policy and Procedures Resolution 78-86.
  - Annual Statement for signature.
  - Letter from the General Manager requesting the ethics policy review and the return of the Annual statement.
  - Copies of any new ethics related procedures.
3. Procurement distributes ethics documents for each employee identified on the Signature Authorization Listing to their respective Department head.
4. Department heads distribute ethics documents to identified staff.
5. Department heads may distribute the ethics documents to employees other than those identified on the Signature Authorization Listing if they determine the employee has significant purchasing responsibilities.
6. Identified employees and Authority members fill out the Annual Statement form and return it to the General Manager within the time frame requested.
7. The General Manager collects and reviews the returned Annual Statement forms and passes them on to Procurement.
8. Procurement will monitor that Annual Statement forms are received from all appropriate personnel, i.e. those employees identified on the Signature Authorization Listing and Authority members.

9. Procurement prepares an operational listing of potential conflict issues and "excluded" businesses based upon a review of the forms submitted.
10. Procurement prepares an official list of "excluded" businesses and distributes to Department heads and to Accounting.
11. Department heads distribute the listing of "excluded" businesses to appropriate staff; i.e., all staff with purchasing authority and those employees determined to have significant purchasing responsibilities.
12. Procurement copies all Annual Statements and delivers originals to Human Resources for filing in respective personnel files. Annual Statement forms will be kept on file for two years and anything over two years old will be destroyed.
13. Procurement makes Ethics documents and Annual Statement forms available for mid-year adjustments.
14. Accounting monitors payment requests for "excluded" businesses and reports to the General Manager any potential violations prior to payment. Accounting will hold payment for any potential violations until authorized by the General Manager.
15. Human Resources distributes Ethics packets to new employees with purchasing authority at their orientation.

<b>PROCUREMENT PROCEDURES</b>	Revision Number: <b>95-3</b>
Subject: Approval Process for Contract Modifications - Contract Amendments	Date: May 11, 1995

## SUMMARY

The following procedures have been formulated to ensure comprehensive processing and approval of contract modifications, pursuant to Intercity Transit Procurement Policy and Procedures, Resolution 78-86, as amended. Modifications are issued for the purpose of making contract changes. Each modification must stand on its own merit, just like a contract. Therefore, there must be a reason for the change, funds to support the change, evidence that the price is fair and reasonable and complete documentation that tells the story of the purchase. Finally, there needs to be a process whereby the elements above can be collected, evaluated and approved at the appropriate level.

## DEFINITIONS:

*Contract Amendments* - Contract modifications in which all changes are bilaterally agreed to, demonstrated by a signature from both Transit and the contractor.

*Change Orders* - Contract modifications that are invoked by Transit and do not require a signature from the contractor. All change orders must be within the general scope of the original contract.

*Administrative Changes* - Contract modifications that are made unilaterally and do not affect the scope of the contract. (For example, changing the paying office locations does not affect the scope of the contract).

## PROCEDURES:

- A. The Project Manager shall have the responsibility to monitor projects and to identify any necessary modifications or changes to the contract.
- B. If the project requires additional work by the contractor which falls outside the Scope of Work established in the contract documents, it is the Project Manager's responsibility to initiate the process for a contract amendment or change order. This procedure (95-3) addresses contract amendments.
- C. A contract amendment is the preferred method, as it is a bilateral agreement wherein both parties agree to the final outcome prior to the work taking place. The following steps will be used to process a contract amendment:
  1. Determine the required change.
  2. Inform contractor in writing of the proposed changes and obtain a proposal for the subject work including the cost and a breakdown of each work element.
  3. Investigate budget impacts.

4. If a single modification totals more than \$25,000, a contractor certification of the cost or pricing data is required, (as per Intercity Transit Procurement Policy 78-86, 3-202 Cost or Pricing Data, 3. Required Submissions Relating to Change Orders or Contract Modifications, 4. Exceptions, 5. Certification Required, 6. Price Adjustment Provision Required.)
5. Analyze the proposal presented with the most appropriate pricing method. (For example unit prices previously set forth, agreed lump sum, time and materials within the context of the current agreement.)
6. If necessary, the Project Manager shall conduct negotiations to reach a mutual agreement.
7. Prepare two originals of the contract modification. Include all changes and adjustments by either party. The Project Manager shall include a cost breakdown, a recommendation for approval and a statement that the price is fair and reasonable.
8. The Procurement and Special Projects Administrator shall review the modification and provide direction if there is a need for additional documentation or review.
9. Obtain Authority approval if the total dollar amount of the modification exceeds \$25,000. Authorization authority for amendments under \$25,000 will be subject to the most recent Signature Authority Directive published by the General Manager.
10. Obtain Contractor's signature on the contract amendment.
11. After the contract amendment is approved, the Project Manager will issue the Contractor a written notice to proceed with the extra work.
12. Contract Amendment distribution:
  - a. One original executed contract amendment is returned to the contractor.
  - b. The second original contract amendment is placed in the Administration department contract files.
  - c. One copy of the amendment shall be placed in the Procurement and Special Projects project files.
13. Project Manager continues to monitor project progress.

<b>PROCUREMENT PROCEDURES</b>	Revision Number: <b>95-4</b>
Subject: Negotiated Procurement, Contract Modification, Approval Process to Issue Notice to Proceed.	Date: May 11, 1995

## SUMMARY

The intent of this procedure (95-4) is to provide a clear understanding of specific requirements that must be fulfilled prior to the commencement of work outside the scope of a contract for negotiated procurements.

## PROCEDURE

- A. All contracts shall include a clause stating that prior written approval from Intercity Transit is necessary to commence work on a contract modification or change.
- B. Once staff has determined that a contract modification is necessary and an amendment must be issued, the following statements apply:
  1. Staff will employ Procurement Procedure 95-3 to process a contract amendment, except in the circumstances noted under #3, below.
  2. Staff shall not direct the consultant to proceed with additional work until the consultant has provided complete documentation relating to the contract amendment and a final amount has been negotiated for the extra work, except as noted under #3 below.
  3. The General Manager may direct consultant to proceed with the work prior to negotiating a final amount for the extra work when:
    - a. Health and welfare of staff or general public is jeopardized; or
    - b. A regulatory agency declares a condition an emergency and demands immediate correction; and delays resulting from using Procurement Procedure 95-3 to address the required correction may place Intercity Transit in a position of non-compliance, with the potential for substantial liability; or
    - c. The complexity of the change does not allow immediate resolution of contract issues and failure to proceed immediately will result in substantial additional project costs to Intercity Transit; or
    - d. As otherwise authorized under Procurement Policy 78-86, Section 3-105 Emergency Procurements.
  4. If the change falls into the exceptions as described in #3 above, staff shall conduct as much review as is practicable under the circumstances, prior to the work taking place.

## PROCUREMENT PROCEDURES

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05/03/96

5. Subsequent to the commencement of work, staff will begin preparing the required documentation pursuant to Procurement Procedure 95-3. The final negotiations, written approvals and file documentation will be prepared along with an explanation of exception to Procurement Procedure 95-3.
6. All exceptions to Procurement Procedure 95-3 must be reviewed and verbally approved by the General Manager prior to extra work taking place.
7. Exceptions that require work anticipated to exceed \$25,000 will be presented to the Authority with supporting documentation, subsequent to the commencement of the work. Prior telephone polling of Authority members will normally be conducted in these instances. If the situation requires immediate action, and polling is not practical, follow-up phone, fax and/or mail will be used to provide information to the Authority at the earliest possible opportunity.

<b>PROCUREMENT PROCEDURES</b>	Revision Number: <b>95-5</b>
Subject: Approval Process for Contract Modifications-Change Orders.	Date:

## SUMMARY

The following procedures have been formulated to ensure comprehensive processing and approval of contract modifications, pursuant to Intercity Transit Procurement Policy and Procedures, Resolution 78-86, as amended. Modifications are issued for the purpose of making contract changes. Each modification must stand on its own merit, just like a contract. Therefore, there must be a reason for the change, funds to support the change, evidence that the price is fair and reasonable and complete documentation that tells the story of the purchase. Finally, there needs to be a process whereby the elements above can be collected, evaluated and approved at the appropriate level.

## DEFINITIONS:

*Contract Amendments* - Contract modifications in which all changes are bilaterally agreed to, demonstrated by a signature from both Transit and the contractor.

*Change Orders* - Contract modifications that are invoked by Transit and do not require a signature from the contractor.

*Administrative Changes* - Contract modifications that are made unilaterally and do not affect the scope of the contract. (For example, changing the paying office locations does not affect the scope of the contract).

## PROCEDURES:

- A. The Project Manager shall have the responsibility to monitor projects and to identify any necessary modifications or changes to the contract.
- B. If the project requires additional work by the contractor which falls outside the Scope of Work established in the contract documents, it is the Project Manager's responsibility to initiate the process for a contract amendment or change order. This procedure addresses contract change orders.
- C. A contract change order is used when a contract amendment is not possible. Upon issuing a change order you are in effect telling the contractor to do the work now and the terms and conditions will be decided later. Change orders must always be followed by a contract amendment to finalize the terms and conditions with a bilateral agreement. The following steps will be used to process a contract change order:
  1. Determine the required change.
  2. Be sure that the contract contains the "changes" clause or another clause which invokes it. If not, and if you cannot issue a supplemental agreement or contract amendment which incorporates the "changes" clause, you are in a "new"

## PROCUREMENT PROCEDURES

procurement situation. In other words, you need to establish a contract based on the new requirement

3. Investigate budget impacts.
4. Prepare the change order document which specifies the change.
5. Be sure to insert a "not to exceed" dollar amount in the change order document..
6. Double check your document to ensure it is complete and explains why the change order must be issued.
7. Obtain the appropriate approval signatures based upon the estimated dollar value of the change order and the Signature Authority Directive issued by the General Manager.
8. The Procurement and Special Projects Administrator shall review the change order and provide direction if there is a need for additional documentation or review.
9. Issue the change order document to the Contractor.
10. Obtain the Contractor's proposal (claim) for equitable adjustment for making the change.
11. Determine the pricing method which is most appropriate for analyzing the contractor's proposal.
12. If necessary, conduct negotiations.
13. If an agreement can be reached with the Contractor prepare a contract amendment which specifies the changes, spells out the consideration for making those changes, and incorporates a "release of claims" from any additional adjustment resulting from the changes.
14. Obtain Contractor's signature on the contract amendment.
15. Double check the contract amendment to be sure it is complete and tells the full purchase story.
16. Obtain Authority approval if the total dollar amount of the amendment exceeds \$25,000. Authorization for amendments under \$25,000 will be subject to the most recent Signature Authority Directive published by the General Manager.
17. Issue the contract modification.
18. Contract Amendment distribution:
  - a. One original executed contract amendment is returned to the contractor.
  - b. The second original contract amendment is placed in the Administration department contract files.
  - c. One copy of the amendment shall be placed in the Procurement and Special Projects project files.
19. Project Manager continues to monitor project progress.



## PROCUREMENT PROCEDURES

20. If you have gone through steps 1 through 12 and cannot reach an agreement you have a dispute concerning a question of fact. This will necessitate the Procurement and Special Projects Administrator issuing a final decision.
21. At this point, you should review the contract amendment file to be absolutely sure that this action is fully documented, all required actions were taken in a timely manner, and there was a sound basis for the Procurement and Special Projects Administrator's final decision. Since the disputes clause provides the Contractor with the right of appeal, it is possible that the final settlement of this transaction may be at the direction of the Authority.
22. Obtain the appropriate legal review before issuing a final decision.

<b>PROCUREMENT PROCEDURES</b>	Revision Number: <b>96-1</b>
Subject: Signature Authority Directive Applicability: All purchases	Date: February 1, 1996

### 1. PROGRAM

Implementation of the *Signature Authority Directive* set forth by the General Manager. This procedure is written pursuant to Intercity Transit's Procurement Policy, Article 2- Office of the Purchasing Agent, Section 2-103- Delegation to Other Intercity Transit Employees.

### 2. DESCRIPTION

The General Manager may delegate procurement authority if he/she deems it necessary for the effective procurement of goods and services for Intercity Transit. Delegation of procurement authority means that employees may conduct and/or authorize procurement activities within parameters defined by the General Manager. The attached *Signature Authority Directive* defines the delegation of procurement authority for Intercity Transit. A matrix format is used to identify position levels, types of procurement activities and corresponding authorization limits.

### 3. ACTIVITIES

1. The *Signature Authority Directive* will be issued by the General Manager to Department Heads for implementation.
2. Department Heads are responsible for implementing department specific programs consistent with the *Signature Authority Directive*.
3. The Procurement and Special Projects Division will assist departments with training, as needed, to implement the *Signature Authority Directive*.
4. The Accounting Division will monitor adherence to the authorization limits set forth in the *Signature Authority Directive*.
5. Department Heads may set more stringent procurement authorization limits within their department. The Department Head will be responsible for monitoring conformance to department specific limits.

### 3. VIOLATIONS

Violations of the *Signature Authority Directive* shall be reported to the Department Head of the violating department and reviewed by the General Manager. The General Manager will determine the appropriate course of action.

## SIGNATURE AUTHORITY DIRECTIVE

This matrix defines Intercity Transit's signature authority for the purchase of all Services, Materials, Equipment and Supplies. The position listed in the matrix is the lowest possible level whose signature must be on the document. The Requester and the Authorizer may be the same person if this condition is met.

Non-Inventory					Parts Inventory & Fuel
Dollar Limits	0 to \$499	\$500 to \$2,499	\$2,500 to \$24,999	\$25,000 & Up	All Procurements
<b>Purchase Request Form</b> Requested by:	All Staff	All Staff	All Staff	All Staff	Inventory Staff
Authorized by:	Dept. Designated Staff	Division Mgrs. & Supervisors	Dept. Head	Dept. Head	Inventory Supervisor
<b>Approve Quote/Bid/ Proposal Award</b>	Dept. Designated Staff	Division Mgrs. & Supervisors	Dept. Head	Authority	Inventory Supervisor (Fuel and Oils only)
<b>Agreement &amp; Amendment Signatures (See Note 2 below)</b>	Dept. Designated Staff	Division Mgrs. & Supervisors	Dept. Head	General Manager	Does Not Apply
<b>Invoice Approval</b>	Requester or Project Coordinator	Requester or Project Coordinator	Requester or Project Coordinator	Requester or Project Coordinator	Inventory Supervisor
<b>Request for Warrant</b> Department Head:	Dept. Head	Dept. Head	Dept. Head	General Manager	Dept. Head (See Note 3 below)

Note 1: Departments may impose more stringent requirements than those defined in the matrix. Departments imposing more stringent requirements are responsible for monitoring conformance to those requirements.

Note 2: If a single agreement amendment or the cumulative value of all amendments takes the total agreement amount over \$25,000 or increases the total agreement by more than one third of the original agreement amount, the amendment must be reviewed and signed by the General Manager.

Note 3: All Warrant Requests totaling \$25,000 & up must be signed by the General Manager on the "Department Head" signature line.

Note 4: The Competitive Sealed Bid process must be used for procurements of \$10,000 or greater, except as addressed under Intercity Transit's Procurement Policy and Procedures 3-101 Competitive Sealed Procurements.

Note 5: Purchases to be charged against another department's budget item is prohibited without signature on the P.O. form by appropriate staff in that specific department, unless authorization has been expressly delegated by the Department Head.

Note 6: A Department Head may delegate procurement authority for their department to another Department Head.

<b>PROCUREMENT PROCEDURES</b>	Revision Number: <b>96-1</b>
Subject: Signature Authority Directive Applicability: All purchases	Date: February 7, 1996

## DESCRIPTION

The attached *signature authority matrix* defines the delegation of procurement authority for **Development Department** purchasing. A matrix format is used to identify position levels, types of procurement activities and corresponding authorization limits.

This procedure implements the *Signature Authority Directive* issued by the General Manager on February 1, 1996. The General Manager may delegate procurement authority if he/ she deems it necessary for the effective procurement of goods and services for Intercity Transit. Delegation of procurement authority means that employees may conduct and/or authorize procurement activities within parameters defined by the General Manager.

## CHANGES AND OTHER INFORMATION

1. A new purchasing category, 0-\$499, is incorporated in the new procedure. Individual departments are authorized to designate staff other than Division Managers and Supervisors to authorize purchases in that range. The Development Department designation is "project coordinator."

"Project coordinator" is defined as a designated individual responsible for budgeted project completion.. The project coordinator may authorize expenditures necessary for the successful completion of their designated projects so long as those expenditures are consistent with the budget, and are within authorization limits.

Project Coordinator designations shall be transmitted to both Accounting and Procurement & Special Projects Divisions.

This delegation of authority does not relieve the Director, Managers or Supervisors of their responsibility for proper purchasing practices and compliance with the budget.

2. If a single agreement amendment, or the cumulative value of all amendments, takes the total agreement amount over \$25,000, or increases the total agreement by more than one third of the original agreement amount, the amendment must be reviewed and signed by the General Manager.
3. All warrant requests totaling \$25,000 and up must be signed by the General Manager on the "Department Head" signature line.

February 7, 1996

## DEVELOPMENT DEPARTMENT - SIGNATURE AUTHORITY DIRECTIVE

### 4.

This matrix defines Development Department staff signature authority for the purchase of all Services, Materials, Equipment and Supplies. The position listed in the matrix is the lowest possible level whose signature must be on the document. The Requester and the Authorizer may be the same person if this condition is met.

Dollar Limits	0 to \$499	\$500 to \$2,499	\$2,500 to \$24,999	\$25,000 & Up
<b>Purchase Request Form</b> Requested by: :	All Staff	All Staff	All Staff	All Staff
Authorized by	Project Coordinator	Division Mgrs. & Supervisors	Dept. Head	Dept. Head
<b>Approve Quote/ Bid/ Proposal/Award</b>	Project Coordinator	Division Mgrs. & Supervisors	Dept. Head	Authority
<b>Agreement &amp; Amendment Signatures</b>	Project Coordinator	Division Mgrs. & Supervisors	Dept. Head	General Manager
<b>Invoice Approval</b>	Requester or Project Coordinator	Requester or Project Coordinator	Requester or Project Coordinator	Requester or Project Coordinator
<b>Request for Warrant</b>	Dept. Head	Dept. Head	Dept. Head	General Manager

May 1, 1996

## MAINTENANCE DEPARTMENT - SIGNATURE AUTHORITY DIRECTIVE

This matrix defines Development Department staff signature authority for the purchase of all Services, Materials, Equipment and Supplies. The position listed in the matrix is the lowest possible level whose signature must be on the document. The Requester and the Authorizer may be the same person if this condition is met.

Dollar Limits	\$0 to \$2,499	\$2,500 to \$24,999	\$25,000 & Up
<b>Purchase Request Form</b> Requested by:	All Staff	All Staff	All Staff
Authorized by:	Maintenance Supervisors	Dept. Head	Dept. Head
<b>Approve</b> <b>Quote/ Bid/ Proposal/Award</b>	Maintenance Supervisor	Dept. Head	Authority
<b>Agreement &amp; Amendment Signatures</b>	Maintenance Supervisor	Dept. Head	General Manager
<b>Invoice Approval</b>	Maintenance Supervisor	Dept. Head	Dept. Head
<b>Request for Warrant</b>	Dept. Head	Dept. Head	General Manager

**Note 1:** A separate "Parts & Supplies Requisition" form is used by Maintenance personnel to request quantities of items above normal stocking levels, one time purchases for special projects and/or campaigns and items to be added to inventory. The approval signatures for the "Requested by" and "Approved by" signature lines shall be consistent with the Signature Authority Directive "Requested by" and "Authorized by" signature lines respectively.

**Note 2:** Purchases Orders for operating supplies, freight, taxes and exempt vendors may be authorized by the Inventory Supervisor up to \$2499. The Director of Maintenance must sign the Department Head signature block for payment approval.

**Note 3:** A copy of all purchase orders authorized by the Maintenance Supervisor shall be sent to the Director of Maintenance.

February 28, 1996

## OPERATIONS DEPARTMENT - SIGNATURE AUTHORITY DIRECTIVE

This matrix defines Development Department staff signature authority for the purchase of all Services, Materials, Equipment and Supplies. The position listed in the matrix is the lowest possible level whose signature must be on the document. The Requester and the Authorizer may be the same person if this condition is met.

Dollar Limits	\$0 to \$2,499	\$2,500 to \$24,999	\$25,000 & Up
<b>Purchase Request Form</b>			
Requested by:	All Staff	All Staff	All Staff
Authorized by:	Division Head	Dept. Head	Dept. Head
<b>Approve Quote/ Bid/ Proposal/Award</b>	Division Head	Dept. Head	Authority
<b>Agreement &amp; Amendment Signatures</b>	Division Head	Dept. Head	General Manager
<b>Invoice Approval</b>	Requester or Division Head	Requester or Division Head	Requester or Division Head
<b>Request for Warrant</b>	Dept. Head	Dept. Head	General Manager

**Note 1:** The following positions have **Division Head** signature authority:

- Paratransit Superintendent
- Transportation Superintendent
- Safety and Training Manager
- Stops and Zones Supervisor

**Note 2:** The position of Operations Director has **Department Head** signature authority

MARKETING AND COMMUNICATIONS DEPARTMENT PROCUREMENT GUIDELINE	Reference: IT Procurement Procedures Revision Number: <b>96-1</b>
Subject: Signature Authority Directive Applicability: All department purchases	Date: February 29, 1996

## DESCRIPTION

The attached *signature authority matrix* defines the delegation of procurement authority for **Marketing and Communications Department** purchasing. A matrix format is used to identify position levels, types of procurement activities and corresponding authorization limits.

This procedure implements the *Signature Authority Directive* issued by the General Manager on February 1, 1996. The General Manager may delegate procurement authority if he/ she deems it necessary for the effective procurement of goods and services for Intercity Transit. Delegation of procurement authority means that employees may conduct and/ or authorize procurement activities within parameters defined by the General Manager.

## CHANGES AND OTHER INFORMATION

1. A new purchasing category, 0- \$499, is incorporated in the new procedure. Individual departments are authorized to designate staff other than Division Managers and Supervisors to authorize purchases in that range. The Marketing and Communications Department designation is "project coordinator."

"Project coordinator" is defined as a designated individual responsible for budgeted project completion. The project coordinator may authorize expenditures necessary for the successful completion of their designated projects so long as those expenditures are consistent with the budget, and are within authorization limits.

Project Coordinator designations shall be transmitted to both Accounting and Procurement & Special Projects Divisions.

This delegation of authority does not relieve the Director, Managers or Supervisors of their responsibility for proper purchasing practices and compliance with the budget.

2. If a single agreement amendment, or the cumulative value of all amendments, takes the total agreement amount over \$25,000, or increases the total agreement by more than one third of the original agreement amount, the amendment must be reviewed and signed by the General Manager.
3. All warrant requests totaling \$25,000 and up must be signed by the General Manager on the "Department Head" signature line.



February 29, 1996

## MARKETING AND COMMUNICATIONS DIVISION - SIGNATURE AUTHORITY DIRECTIVE

This matrix defines Marketing and Communications Division staff signature authority for the purchase of all Services, Materials, Equipment and Supplies. The position listed in the matrix is the lowest possible level whose signature must be on the document. The Requester and the Authorizer may be the same person if this condition is met.

Dollar Limits	0 to \$499	\$500 to \$2,499	\$2,500 to \$24,999	\$25,000 & Up
<b>Purchase Request Form</b> Requested by:	All Staff	All Staff	All Staff	All Staff
Authorized by:	Project Coordinator	Division Mgrs. & Supervisors	Dept. Head	Dept. Head
<b>Approve</b> <b>Quote/ Bid/ Proposal/Award</b>	Project Coordinator	Division Mgrs. & Supervisors	Dept. Head	Authority
<b>Agreement &amp; Amendment Signatures</b>	Project Coordinator	Division Mgrs. & Supervisors	Dept. Head	General Manager
<b>Invoice Approval</b>	Requester or Project Coordinator	Requester or Project Coordinator	Requester or Project Coordinator	Requester or Project Coordinator
<b>Request for Warrant</b>	Dept. Head	Dept. Head	Dept. Head	General Manager

**Note 1:** Positions with **Project Coordinator** signature authority: **Senior Marketing Representative and Marketing Representative.**

**Note 2:** Positions with **Division Manager & Supervisor** signature authority: **Commuter Services Manager and Customer Services Supervisor.**

**Note 3:** Position with **Department Head** signature authority: **Marketing and Communications Director.**



**Washington State Auditor's Office**

**Troy Kelley**

**Integrity • Respect • Independence**

**Financial Statements and Federal Single Audit  
Report**

**Intercity Transit**

**Thurston County**

**For the period January 1, 2013 through December 31, 2013**

**Published September 22, 2014**

**Report No. 1012638**





**Washington State Auditor  
Troy Kelley**

September 22, 2014

Board of Directors  
Intercity Transit  
Olympia, Washington

**Report on Financial Statements and Federal Single Audit**

Please find attached our report on the Intercity Transit's financial statements and compliance with federal laws and regulations.

We are issuing this report in order to provide information on the Transit's financial condition.

Sincerely,

TROY KELLEY  
STATE AUDITOR

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# Federal Summary

## Intercity Transit Thurston County January 1, 2013 through December 31, 2013

The results of our audit of the Intercity Transit are summarized below in accordance with U.S. Office of Management and Budget Circular A-133.

### ***FINANCIAL STATEMENTS***

An unmodified opinion was issued on the basic financial statements.

#### ***Internal Control Over Financial Reporting:***

- ***Significant Deficiencies:*** We reported no deficiencies in the design or operation of internal control over financial reporting that we consider to be significant deficiencies.
- ***Material Weaknesses:*** We identified no deficiencies that we consider to be material weaknesses.

We noted no instances of noncompliance that were material to the financial statements of the Transit.

### ***FEDERAL AWARDS***

#### ***Internal Control Over Major Programs:***

- ***Significant Deficiencies:*** We reported no deficiencies in the design or operation of internal control over major federal programs that we consider to be significant deficiencies.
- ***Material Weaknesses:*** We identified no deficiencies that we consider to be material weaknesses.

We issued an unmodified opinion on the Transit's compliance with requirements applicable to each of its major federal programs.

We reported no findings that are required to be disclosed under section 510(a) of OMB Circular A-133.

***Identification of Major Programs:***

The following were major programs during the period under audit:

<u>CFDA No.</u>	<u>Program Title</u>
20.500	Federal Transit Cluster - Federal Transit - Capital Investment Grants
20.507	Federal Transit Cluster - Federal Transit - Formula Grants

The dollar threshold used to distinguish between Type A and Type B programs, as prescribed by OMB Circular A-133, was \$300,000.

The Transit did not qualify as a low-risk auditee under OMB Circular A-133.

## Schedule of Prior Federal Audit Findings

### Intercity Transit Thurston County January 1, 2013 through December 31, 2013

This schedule presents the status of federal findings reported in prior audit periods. The status listed below is the representation of the Intercity Transit. The State Auditor's Office has reviewed the status as presented by the Transit.

<b>Audit Period:</b> January 1, 2012 through December 31, 2012	<b>Report Ref. No:</b> 1010625	<b>Finding Ref. No: 1</b>	<b>CFDA Number(s):</b> 20.200, 20.507
<b>Federal Program Name and Granting Agency:</b> Federal Transit Capital Investment Grants Federal Transit Formula Grants U.S. Department of Transportation/Federal Transit Administration		<b>Pass-Through Agency Name:</b> NA	
<b>Finding Caption:</b> The Transit's internal controls were not adequate to ensure compliance with federal requirements.			
<b>Background:</b> The Federal Transit Cluster is comprised of Federal Transit Capital Investment Grants and Federal Transit Formula Grants. The objectives are to assist in financing the planning, acquisition, construction, preventive maintenance, and improvement of facilities and equipment in public transportation services.  In 2012 the Transit charged \$4,128,219 to the Formula Grant and \$3,872,007 to the Capital Investment grant.  During our audit, we noted the following material weaknesses in the Transit's internal controls:  <u>Allowable Costs, Matching and Reporting</u> – The Transit does not have documentation to specifically identify grant expenditures and matching amounts included in the request for reimbursement through the Electronic Clearing House Operation or the quarterly Federal Financial Reports submitted to the Federal Transit Administration. Rather, the Transit maintains spreadsheets that pool the costs it deems allowable for reimbursement or matching, and removes the costs it determines are unallowable.  Further, the cost spreadsheets and quarterly reports are prepared by the Transit's grant coordinator without any review of the request for reimbursement or quarterly financial reports by Transit management to ensure they reconcile accurately to supporting documentation.			

We also noted the following significant deficiency in the Transit's internal controls:

Equipment – The Transit does not have a process in place to ensure that a physical inventory of assets purchased with federal funds is performed every two years. The last inventory was completed in August 2010.

**Status of Corrective Action: (check one)**

<input type="checkbox"/> Fully Corrected	<input checked="" type="checkbox"/> Partially Corrected	<input type="checkbox"/> No Corrective Action Taken	<input type="checkbox"/> Finding is considered no longer valid
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**Corrective Action Taken:**

*Allowable Costs, Matching and Reporting - Based upon reviews conducted by the Federal Transit Administration's Region 10 personnel and also upon the recently completed Federal Transit Administrations Triennial review our existing accounting system, and reporting system, were deemed to be compliant with federal requirements and no corrective action was necessary.*

*Equipment – Inventory was completed on May 16, 2014.*



**Independent Auditor's Report on Internal Control over  
Financial Reporting and on Compliance and Other Matters  
Based on an Audit of Financial Statements Performed in  
Accordance with *Government Auditing Standards***

**Intercity Transit  
Thurston County  
January 1, 2013 through December 31, 2013**

Board of Directors  
Intercity Transit  
Olympia, Washington

We have audited, in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, the financial statements of the Intercity Transit, Thurston County, Washington, as of and for the years ended December 31, 2013 and 2012, and the related notes to the financial statements, which collectively comprise the Transit's basic financial statements, and have issued our report thereon dated September 16, 2014.

***INTERNAL CONTROL OVER FINANCIAL REPORTING***

In planning and performing our audits of the financial statements, we considered the Transit's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Transit's internal control. Accordingly, we do not express an opinion on the effectiveness of the Transit's internal control.

*A deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. *A material weakness* is a deficiency, or a combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the Transit's financial statements will not be prevented, or detected and corrected on a timely basis. *A significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did

not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

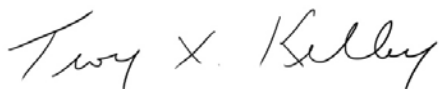
### ***COMPLIANCE AND OTHER MATTERS***

As part of obtaining reasonable assurance about whether the Transit's financial statements are free from material misstatement, we performed tests of the Transit's compliance with certain provisions of laws, regulations, contracts and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion.

The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

### ***PURPOSE OF THIS REPORT***

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Transit's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Transit's internal control and compliance. Accordingly, this communication is not suitable for any other purpose. However, this report is a matter of public record and its distribution is not limited. It also serves to disseminate information to the public as a reporting tool to help citizens assess government operations.



**TROY KELLEY**  
STATE AUDITOR

September 16, 2014

# **Independent Auditor's Report on Compliance for Each Major Federal Program and on Internal Control over Compliance in Accordance with OMB Circular A-133**

**Intercity Transit  
Thurston County  
January 1, 2013 through December 31, 2013**

Board of Directors  
Intercity Transit  
Olympia, Washington

## ***REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM***

We have audited the compliance of the Intercity Transit, Thurston County, Washington, with the types of compliance requirements described in the U.S. *Office of Management and Budget (OMB) Circular A-133 Compliance Supplement* that could have a direct and material effect on each of its major federal programs for the year ended December 31, 2013. The Transit's major federal programs are identified in the accompanying Federal Summary.

### ***Management's Responsibility***

Management is responsible for compliance with the requirements of laws, regulations, contracts and grants applicable to its federal programs.

### ***Auditor's Responsibility***

Our responsibility is to express an opinion on compliance for each of the Transit's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and OMB Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*. Those standards and OMB Circular A-133 require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about the Transit's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination on the Transit's compliance.

### ***Opinion on Each Major Federal Program***

In our opinion, the Transit complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended December 31, 2013.

### ***REPORT ON INTERNAL CONTROL OVER COMPLIANCE***

Management of the Transit is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered the Transit's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program in order to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with OMB Circular A-133, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the Transit's internal control over compliance.

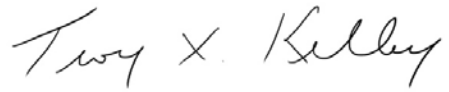
*A deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

### ***PURPOSE OF THIS REPORT***

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of OMB Circular A-133. Accordingly, this report is not suitable for any other purpose. However, this report is a matter of public record and its distribution is not limited.

It also serves to disseminate information to the public as a reporting tool to help citizens assess government operations.

A handwritten signature in cursive script that reads "Troy X. Kelley".

**TROY KELLEY**  
STATE AUDITOR

September 16, 2014

# Independent Auditor's Report on Financial Statements

## Intercity Transit Thurston County January 1, 2013 through December 31, 2013

Board of Directors  
Intercity Transit  
Olympia, Washington

### ***REPORT ON THE FINANCIAL STATEMENTS***

We have audited the accompanying financial statements of the Intercity Transit, Thurston County, Washington, as of and for the years ended December 31, 2013 and 2012, and the related notes to the financial statements, which collectively comprise the Transit's basic financial statements as listed on page 16.

#### ***Management's Responsibility for the Financial Statements***

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

#### ***Auditor's Responsibility***

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the Transit's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Transit's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### ***Opinion***

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Intercity Transit, as of December 31, 2013 and 2012, and the changes in financial position and cash flows thereof for the years then ended in accordance with accounting principles generally accepted in the United States of America.

### ***Other Matters***

#### *Required Supplementary Information*

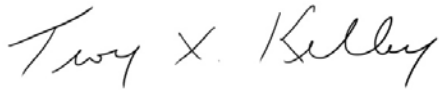
Accounting principles generally accepted in the United States of America require that the management's discussion and analysis on pages 17 through 26 be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

#### *Supplementary and Other Information*

Our audits were conducted for the purpose of forming an opinion on the financial statements that collectively comprise the Transit's basic financial statements. The accompanying Schedule of Expenditures of Federal Awards is presented for purposes of additional analysis as required by U.S. Office of Management and Budget Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*. This schedule is not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the basic financial statements taken as a whole.

***OTHER REPORTING REQUIRED BY GOVERNMENT AUDITING STANDARDS***

In accordance with *Government Auditing Standards*, we have also issued our report dated September 16, 2014 on our consideration of the Transit's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Transit's internal control over financial reporting and compliance.



**TROY KELLEY**  
STATE AUDITOR

September 16, 2014



# Financial Section

**Intercity Transit  
Thurston County  
January 1, 2013 through December 31, 2013**

## ***REQUIRED SUPPLEMENTARY INFORMATION***

Management's Discussion and Analysis – 2013 and 2012

## ***BASIC FINANCIAL STATEMENTS***

Comparative Statement of Net Position – 2013 and 2012

Comparative Statement of Revenues, Expenses and Changes in Fund Net Position – 2013  
and 2012

Comparative Statement of Cash Flows – 2013 and 2012

Notes to Financial Statements – 2013 and 2012

## ***SUPPLEMENTARY AND OTHER INFORMATION***

Schedule of Expenditures of Federal Awards – 2013

Notes to the Schedule of Expenditures of Federal Awards – 2013

# **INTERCITY TRANSIT**

## **Management's Discussion and Analysis**

This section of Intercity Transit's Annual Financial Report represents management's overview and analysis of Intercity Transit's financial performance for the fiscal years ended December 31, 2013 and December 31, 2012. This section should be read in conjunction with the financial statements which follow.

### **Introduction**

Intercity Transit is a public transportation benefit area corporation providing public transportation services to the Thurston County community. Services include:

- Local and intercounty bus services.
- Paratransit services for the elderly and disabled.
- A vanpool program and ridematch services.

### **Financial Highlights for 2013**

- As of December 31, 2013, Intercity Transit's position exceeded its liabilities by \$70.4 million. The full \$70.4 million is available to meet the primary goal of providing service to the public. These funds may also be invested in future capital improvements as discussed in Intercity Transit's Six-Year Plan.
- Intercity Transit's total net assets increased by \$2.4 million. Intercity Transit maintained approximately the same amount of fixed route service in 2013, except for grant funded express service between Tumwater and Lakewood, and Olympia to DuPont with continuing service to Seattle. Small increases in demand response service and vanpool operations also occurred in 2013.
- Capital grants amounted to \$312,000.
- Intercity Transit's primary source of funding is from local sales taxes. Intercity Transit's sales tax revenue increased from \$28.1 million in 2012 to \$29.4 million in 2013.

### **Overview of the Financial Statements**

This discussion and analysis section serves as an introduction to Intercity Transit's basic financial statements. Intercity Transit is a stand-alone enterprise fund, and the financial statements report information using accounting methods similar to those used by private-sector businesses.

The Statement of Net Position presents information about all of Intercity Transit's assets and liabilities. The difference between assets and liabilities is reported as net position. When net position is compared for several years, increases and decreases may serve as a useful indicator of whether Intercity Transit's financial position is improving or deteriorating.

The Statement of Revenues, Expenses, and Changes in Net Position presents information showing how Intercity Transit's net position changed during the fiscal year. All changes in net position are reported as soon as the event occurs, regardless of the timing of related cash flows.

The Statement of Cash Flows presents information on Intercity Transit's cash receipts, cash payments, and changes in cash and cash equivalents during the fiscal year.

The basic financial statements can be found in this report.

The notes to the financial statements provide additional information that is essential to a full understanding of the data provided in the financial statements. Notes to the financial statements can be found in this report.

In addition to the basic financial statements, the accompanying notes contain supporting schedules comparing revenues and expenses to the budget using a cash basis of accounting. These schedules are intended to provide additional information for analysis, but they are not a required part of the basic financial statements. These notes can be found in this report.

### ***Intercity Transit's Financial Position***

Intercity Transit's financial position, like the economy as a whole, was shaken during 2011 and 2012, but has stabilized in 2013. One major concern during the last few years has been the rising cost of fuel, and that issue was a concern at the end of 2013 as well. The other major concern is the fluctuation of sales tax revenue that has occurred since 2008. However, Intercity Transit's current financial reserves allowed it to weather these stresses through 2013, and the same level of service is planned into the foreseeable future.

From the Comparative Statement of Net Position:

Current assets net of current liabilities amounted to \$33.1 million for the year ended December 31, 2013 as compared to \$28.6 million for 2012.

Cash reserves available to meet current and future obligations increased from \$23.4 million in 2012 to \$24.4 million in 2013.

As of December 31, 2013, Intercity Transit had no long-term public financing debt.

### ***Financial Analysis***

As noted earlier, net position may serve over time as a useful indicator of a government's financial position. For the year ended December 31, 2013, Intercity Transit's assets exceeded liabilities by \$70.4 million.

The following is a summary of Intercity Transit's net position:

**Summary Statements of Net Position**

	2013	2012	2011	Net increase (decrease) 2012 vs. 2013
<b>Assets:</b>				
Current Assets	\$35,166,628	\$30,716,951	\$26,867,284	\$4,449,677
Capital Assets	38,531,052	40,495,829	37,077,542	(1,964,777)
<b>Total Assets</b>	<b>73,697,680</b>	<b>71,212,780</b>	<b>63,944,826</b>	<b>2,484,900</b>
<b>Liabilities:</b>				
Current Liabilities	2,069,755	2,070,454	1,882,326	(699)
Long-Term Liabilities	1,098,864	1,031,259	1,073,949	67,605
<b>Total Liabilities</b>	<b>3,168,619</b>	<b>3,101,713</b>	<b>2,956,275</b>	<b>66,906</b>
<b>Deferred Inflows</b>	<b>80,326</b>	<b>50,886</b>	<b>44,129</b>	<b>29,440</b>
<b>Net Position:</b>				
Investment in capital assets (net)	38,531,052	40,495,829	37,077,542	(1,964,777)
Unrestricted	31,917,683	27,564,352	23,866,880	4,353,331
<b>Total Net Position</b>	<b>\$70,448,735</b>	<b>\$68,060,181</b>	<b>\$60,944,422</b>	<b>\$2,388,554</b>

Public transportation is a capital-intensive enterprise. Consequently, 54.7 percent of Intercity Transit's net position was invested in capital assets. Because these assets are used to provide services to citizens, they are not available for future spending.

There are no external restrictions on assets. However, Intercity Transit's Authority has designated an operating reserve equal to one fourth of the current operating budget (a ninety-day reserve). For 2013 the designated reserve was \$8.9 million.

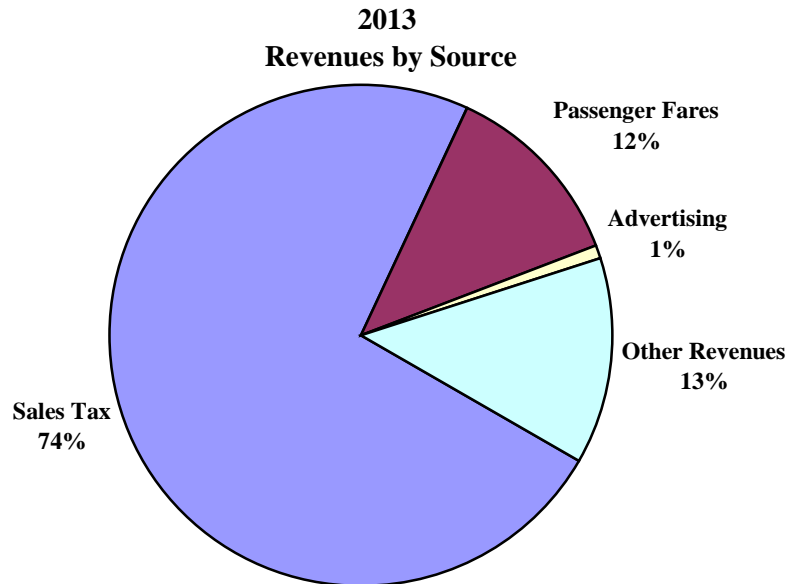
Intercity Transit's net position increased by \$2.4 million during the current fiscal year. Key elements of this increase are on the following page:

## Summary Statements of Revenues, Expenses and Changes in Net Position

	2013	2012	2011	Net increase (decrease) 2012 vs. 2013
Operating Revenues:				
Passenger Fares	\$ 4,906,192	\$ 4,380,984	\$ 4,042,793	\$ 525,208
Advertising	321,774	299,758	278,765	22,016
Non-Operating Revenues:				
Sales Tax	29,381,345	28,193,293	27,828,553	1,188,052
Other revenues	5,287,913	4,877,202	2,305,745	410,711
Gain(Loss) on Capital Assets	18,116	182,024	118,004	(163,908)
<b>Total Revenues</b>	<b>39,915,340</b>	<b>37,933,261</b>	<b>34,573,860</b>	<b>1,982,079</b>
Expenses:				
Operations and Maintenance	25,476,662	26,392,775	23,519,826	(916,113)
General and Administrative	7,101,105	7,662,330	6,958,255	(561,225)
Depreciation	5,177,241	5,103,585	4,606,193	73,656
Accrued Vac/Sick Leave Exp	83,972	(146,977)	270,339	230,949
<b>Total Expenses</b>	<b>\$37,838,980</b>	<b>\$39,011,713</b>	<b>35,354,613</b>	<b>(1,172,733)</b>
Net Income Before Contributions	2,076,360	(1,078,452)	(780,753)	3,154,812
Capital Grants/Contributions	312,194	8,194,211	1,822,975	(7,882,017)
<b>Total Change in Net Position</b>	<b>2,388,554</b>	<b>7,115,759</b>	<b>1,042,222</b>	<b>(4,727,205)</b>
Net Position—Beginning of Year	68,060,181	60,944,422	59,902,200	7,115,759
<b>Net Position – End of Year</b>	<b>\$70,448,735</b>	<b>\$68,060,181</b>	<b>\$60,944,422</b>	<b>\$ 2,388,554</b>

## Revenues

During 2013, revenues increased by \$2 million, or 5.23 percent, while capital contributions decreased by \$7.9 million. Revenues from major sources are illustrated below (Source: Summary Statement of Revenues):



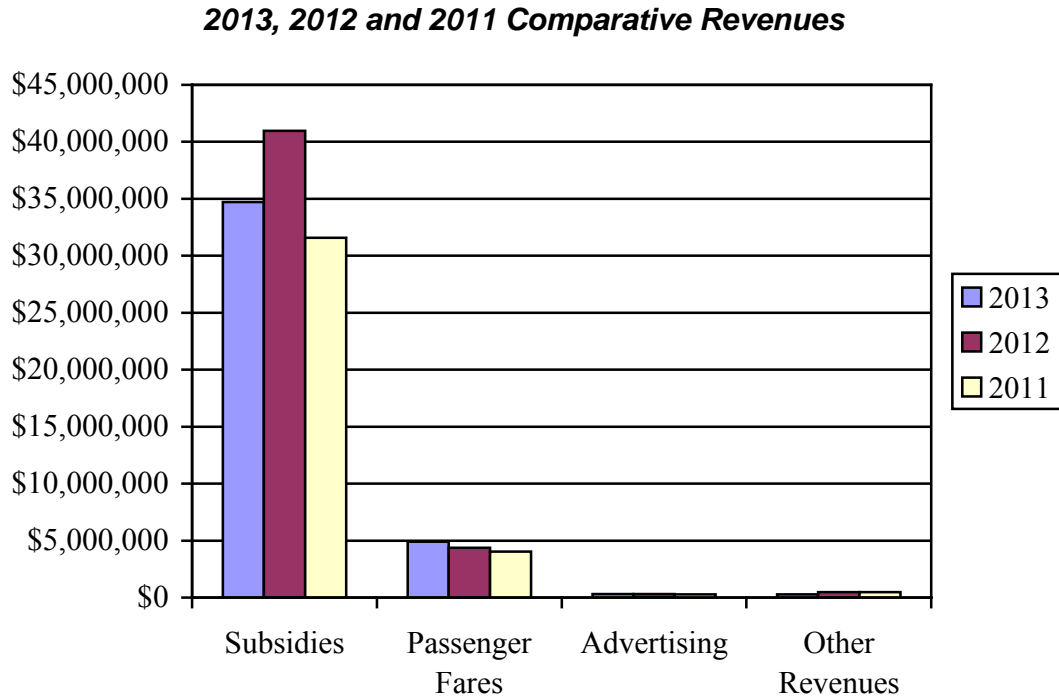
Total operating revenue sources (passenger fares and advertising) increased between 2012 and 2013 by \$547,224 (12% increase). Sales tax revenues increased by \$1.2 million from 2012, (4.2% increase). Other revenue sources (operating grants, interest income, miscellaneous revenues and gain/loss on disposal of assets) increased by \$247,000 (4.9% increase) between 2012 and 2013, and capital contributions decreased by \$7.9 million (96.2% decrease).

Passenger fares increased slightly in 2013. Total ridership decreased from 5,662,000 in 2012 to 5,352,000 in 2013, a 0.18% decrease. Fares increased 25% on January 1, 2013 resulting in increased revenues despite the slight decrease in ridership.

Other revenues increased by \$247,000 or 0.7%. There was a slight increase in Federal/State operating assistance, and decreases in interest earnings, miscellaneous income and revenue from the disposal of assets between 2013 and 2012.

Advertising revenue didn't significantly change from 2011 to 2012.

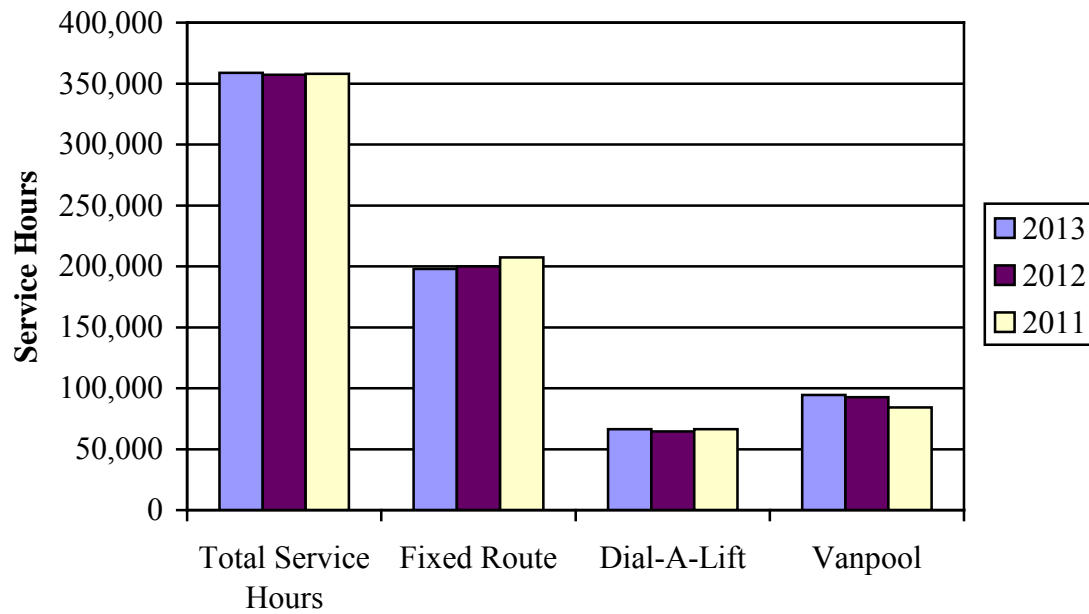
The following graph compares revenues by function for 2013, 2012 and 2011.



**Expenses**

Per the Comparative Statement of Expenses, 2013 expenses decreased by \$1.2 million, or 3 percent.

### 2013, 2012 and 2011 Comparative Service Hours

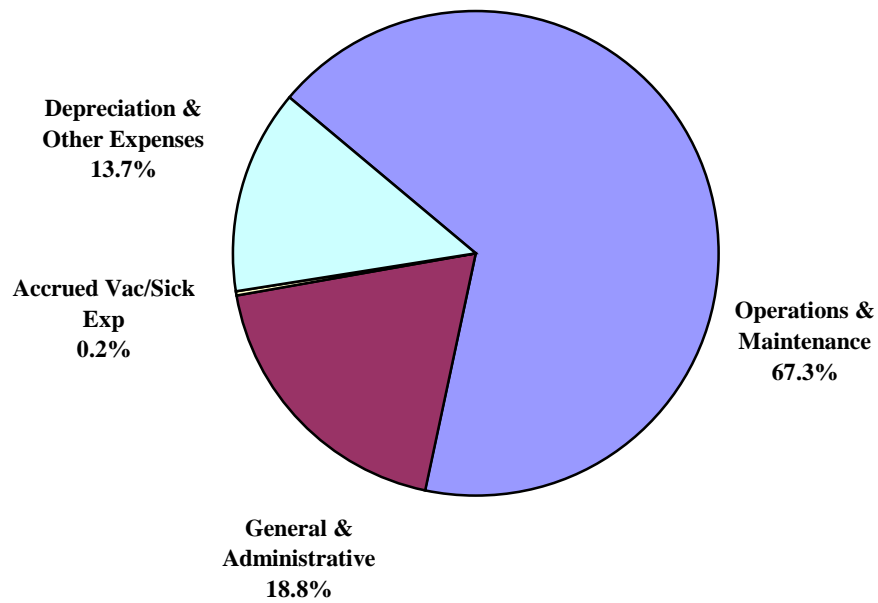


Total operating expense, excluding depreciation, is significantly impacted by the number of hours of service Intercity Transit provides. Total service hours for all modes increased slightly in 2013.

Expenses by major function are shown below:

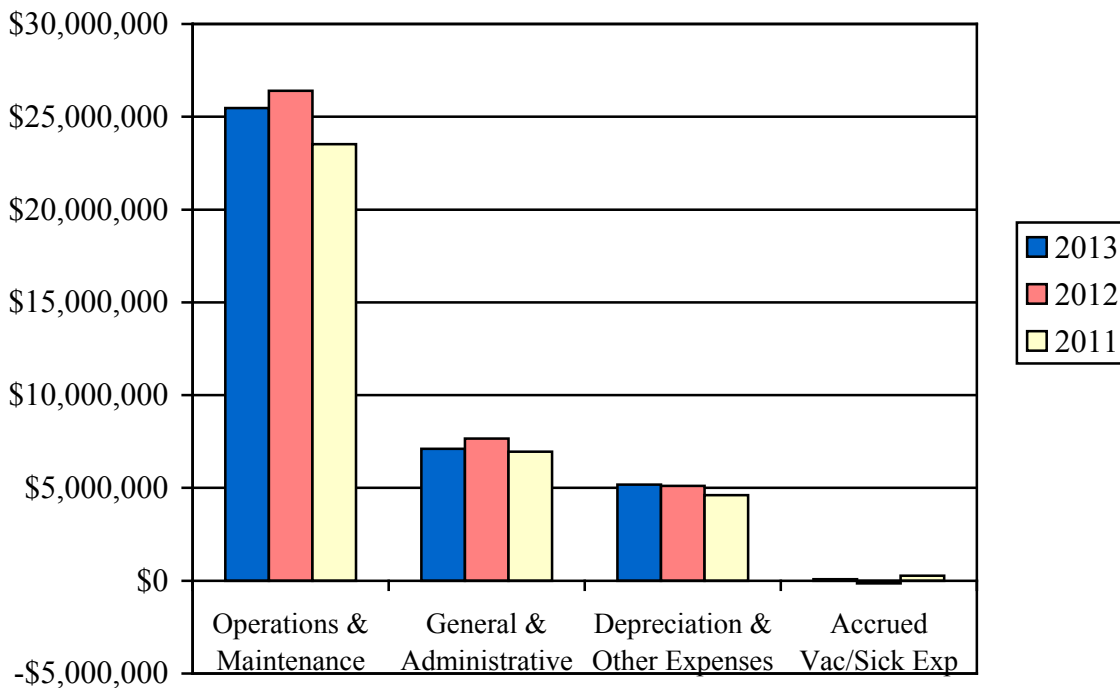


### 2013 Expenses by Function



The graph on the following page compares expenses by function for 2013, 2012 and 2011.

### 2013, 2012 and 2011 Comparative Expenses



Operations and maintenance expenses decreased by \$916,000, or 3.5 percent. In 2012, Intercity Transit expensed approximately \$1.8 million in improvement costs to the Martin Way Park & Ride, which caused an increase in 2012 costs. Also, there were increases in the costs for fuels and lubricants.

General and administrative expenses decreased by \$561,000 or 7.3 percent. In 2012, there were higher expenditures for engineering services for a bus stop improvement project, which was not repeated in 2013.

Depreciation expenses increased \$73,600, or 1.44%.

### **Capital Assets**

Capital assets include revenue vehicles, support vehicles, land and buildings, equipment, and passenger facilities.

Intercity Transit's investment in capital assets as of December 31, 2013, amounted to \$38.5 million, net of accumulated depreciation. Capital assets decreased \$1.9 million or 4.9% during 2013. The decrease consisted of \$1.4 million in net additions and \$3.3 million increase in accumulated depreciation.

Major acquisitions during 2013 included:

- Completion of an automated fueling system (\$247,000)
- Purchase of ten Dial A Lift buses (\$1.4 million)
- Purchase of 55 replacement and expansion vanpool vans (\$1.4 million)

For additional information on Intercity Transit's capital assets please see the notes to the financial statements included with this report.

### **Debt Administration**

At December 31, 2011, December 31, 2012 and December 31, 2013 Intercity Transit had no long-term debt.

### ***Economic Factors and Future Outlook***

Thurston County's March unemployment rates for 2012, 2013 and 2014 compared to Washington State and the nation as a whole are as follows:

	March 2014	March 2013	March 2012
Thurston County	6.9%	7.9%	8.4%
Washington State	6.3%	7.3%	8.3%
United States	6.7%	7.7%	8.2%

The 2013 budget is summarized below:

Operating Fund Revenues	\$ 5,134,834
Capital Grants and Contributions	6,928,868
Non-Transportation Revenue	410,186
Subsidies (Sales Tax/Operating Assistance)	33,312,912
Total Budgeted Revenues	<u>\$45,786,800</u>
Operating Expenses	\$35,657,518
Capital Projects	12,110,682
Total Expenditures	<u>\$47,768,200</u>

### ***Requests for Information***

This financial report is designed to provide a general overview of Intercity Transit finances for anyone who has an interest. Questions concerning any of the information presented in this report or requests for additional financial information should be addressed to:

Leslie Williamson  
Intercity Transit  
P.O. Box 659  
Olympia, WA 98507-0659

**INTERCITY TRANSIT  
COMPARATIVE STATEMENT OF NET POSITION  
AS OF DECEMBER 31, 2013 AND 2012**

	<b>2013</b>		<b>2012</b>	
<b>ASSETS</b>				
<b>CURRENT ASSETS</b>				
Cash & Cash Equivalents	\$	24,414,471	\$	23,396,617
Receivables		5,634,499		5,392,734
Due From Government Units		4,308,724		996,961
Inventories		808,934		930,639
<b>TOTAL CURRENT ASSETS</b>	<b>\$</b>	<b>35,166,628</b>	<b>\$</b>	<b>30,716,951</b>
<b>NONCURRENT ASSETS</b>				
<b>CAPITAL ASSETS NOT BEING DEPRECIATED</b>				
Land	\$	5,331,565	\$	5,331,565
Work In Process		8,990,444		8,969,152
<b>CAPITAL ASSETS BEING DEPRECIATED</b>				
Facilities		15,820,434		15,820,434
Revenue Equipment		38,694,571		37,732,530
Communication Equipment		5,742,209		5,742,209
Administrative Vehicles		578,212		584,697
Shop Equipment		1,871,676		1,615,508
Office/IS Equipment/Software		1,545,077		1,413,816
Miscellaneous Equipment		707,286		707,286
(Less) Total Accumulated Depreciation		(40,750,422)		(37,421,368)
<b>TOTAL NONCURRENT ASSETS</b>	<b>\$</b>	<b>38,531,052</b>	<b>\$</b>	<b>40,495,829</b>
<b>TOTAL ASSETS</b>	<b>\$</b>	<b>73,697,680</b>	<b>\$</b>	<b>71,212,780</b>
<b>LIABILITIES</b>				
<b>CURRENT LIABILITIES</b>				
Accounts Payable	\$	433,804	\$	617,646
Accrued Wages & Benefits		1,136,435		969,660
Accrued Vacation		499,516		483,148
<b>TOTAL CURRENT LIABILITIES</b>	<b>\$</b>	<b>2,069,755</b>	<b>\$</b>	<b>2,070,454</b>
<b>NONCURRENT LIABILITIES</b>				
Accrued Vacation/Sick Leave	\$	1,098,864	\$	1,031,259
<b>TOTAL NONCURRENT LIABILITIES</b>	<b>\$</b>	<b>1,098,864</b>	<b>\$</b>	<b>1,031,259</b>
<b>TOTAL LIABILITIES</b>	<b>\$</b>	<b>3,168,619</b>	<b>\$</b>	<b>3,101,713</b>
<b>DEFERRED INFLOWS OF RESOURCES</b>				
Payments received in advance		80,326		50,886
<b>TOTAL DEFERRED INFLOWS OF RESOURCES</b>	<b>\$</b>	<b>80,326</b>	<b>\$</b>	<b>50,886</b>
<b>NET POSITION</b>				
Net Investment in Capital Assets	\$	38,531,052	\$	40,495,829
Unrestricted		31,917,683		27,564,352
<b>TOTAL NET POSITION</b>	<b>\$</b>	<b>70,448,735</b>	<b>\$</b>	<b>68,060,181</b>

SEE ACCOMPANYING NOTES TO THE FINANCIAL STATEMENTS

**INTERCITY TRANSIT  
COMPARATIVE STATEMENT OF REVENUES, EXPENSES AND  
CHANGES IN FUND NET POSITION  
FOR THE YEARS ENDING DECEMBER 31, 2013 AND 2012**

	<b>2013</b>		<b>2012</b>	
<b>OPERATING INCOME</b>				
Fares	\$	3,060,258	\$	2,739,437
Vanpool		1,845,934		1,641,547
Advertising		321,774		299,758
<b>TOTAL OPERATING REVENUE</b>	<b>\$</b>	<b>5,227,966</b>	<b>\$</b>	<b>4,680,742</b>
<b>OPERATING EXPENSES</b>				
Operations	\$	16,084,290	\$	15,019,883
Vehicle Maintenance		7,992,777		7,910,941
Non-Vehicle Maintenance		1,399,595		3,461,951
General & Administration		7,101,105		7,662,330
Depreciation		5,177,241		5,103,585
Accrued Vacation Expense		20,256		(121,893)
Accrued Sick Leave Expense		63,716		(25,084)
<b>TOTAL OPERATING EXPENSES</b>	<b>\$</b>	<b>37,838,980</b>	<b>\$</b>	<b>39,011,713</b>
<b>OPERATING INCOME (LOSS)</b>	<b>\$</b>	<b>(32,611,014)</b>	<b>\$</b>	<b>(34,330,971)</b>
<b>NON-OPERATING REVENUES (EXPENSES)</b>				
Sales Tax	\$	29,381,345	\$	28,193,293
Federal/State Operating Assistance		5,036,135		4,576,677
Interest Income		142,073		159,924
Miscellaneous		109,705		140,601
Gain (Loss) on Disposal of Assets		18,116		182,024
<b>TOTAL NON-OPERATING REVENUES (EXPENSES)</b>	<b>\$</b>	<b>34,687,374</b>	<b>\$</b>	<b>33,252,519</b>
<b>NET INCOME (LOSS) BEFORE CONTRIBUTIONS</b>	<b>\$</b>	<b>2,076,360</b>	<b>\$</b>	<b>(1,078,452)</b>
Capital Contributions		312,194		8,194,211
<b>CHANGE IN NET POSITION</b>	<b>\$</b>	<b>2,388,554</b>	<b>\$</b>	<b>7,115,759</b>
<b>NET POSITION, BEGINNING</b>	<b>\$</b>	<b>68,060,181</b>	<b>\$</b>	<b>60,944,422</b>
<b>NET POSITION, ENDING</b>	<b>\$</b>	<b>70,448,735</b>	<b>\$</b>	<b>68,060,181</b>

SEE ACCOMPANYING NOTES TO FINANCIAL STATEMENTS

**INTERCITY TRANSIT  
COMPARATIVE STATEMENT OF CASH FLOWS  
FOR THE YEARS ENDING DECEMBER 31, 2013 AND 2012**

	<b>2013</b>	<b>2012</b>
<b>OPERATING ACTIVITIES:</b>		
Cash Received From Customers	\$ 4,918,827	\$ 4,461,608
Payments for Wages & Benefits	(23,599,533)	(22,876,659)
Payments for Operating Expenses	(8,791,827)	(11,004,299)
Cash Received From Advertising Income	343,688	294,159
<b>NET CASH USED BY OPERATING ACTIVITIES</b>	<b>\$ (27,128,845)</b>	<b>\$ (29,125,191)</b>
<b>NONCAPITAL FINANCING ACTIVITIES</b>		
Cash Received From Sales Tax	\$ 29,250,739	\$ 28,175,394
Cash Received From Operating Grants	1,021,137	4,551,871
<b>NET CASH PROVIDED FROM NONCAPITAL ACTIVITIES</b>	<b>\$ 30,271,876</b>	<b>\$ 32,727,265</b>
<b>CAPITAL &amp; RELATED FINANCING ACTIVITIES</b>		
Capital Contributed by Federal Agencies	\$ 131,586	\$ 3,792,568
Capital Contributed by State/Local Agencies	883,842	3,689,511
Cash Received From Sale of Capital Assets	18,116	205,733
Acquisition of Capital Assets	(3,294,230)	(8,449,761)
<b>NET CASH USED FOR CAPITAL &amp; RELATED ACTIVITIES</b>	<b>\$ (2,260,686)</b>	<b>\$ (761,949)</b>
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>		
Cash Received from Interest on Investments	\$ 135,509	\$ 172,250
<b>NET CASH PROVIDED BY INVESTING ACTIVITIES</b>	<b>\$ 135,509</b>	<b>\$ 172,250</b>
<b>NET INCREASE IN CASH &amp; CASH EQUIVALENTS</b>	<b>1,017,854</b>	<b>3,012,375</b>
<b>CASH &amp; CASH EQUIVALENTS - BEGINNING OF THE YEAR</b>	<b>\$ 23,396,617</b>	<b>\$ 20,384,242</b>
<b>CASH &amp; CASH EQUIVALENTS - END OF THE YEAR</b>	<b>\$ 24,414,471</b>	<b>\$ 23,396,617</b>

**NONCASH INVESTING, CAPITAL, AND FINANCING ACTIVITIES:**

For the year ending December 31, 2013 there were no noncash investing, capital or financing activities.

SEE ACCOMPANYING NOTES TO FINANCIAL STATEMENTS

**INTERCITY TRANSIT  
COMPARATIVE STATEMENT OF CASH FLOWS  
FOR THE YEARS ENDING DECEMBER 31, 2013 AND 2012**

**RECONCILIATION OF OPERATING INCOME  
TO NET CASH PROVIDED BY OPERATING ACTIVITIES**

	<u>2013</u>	<u>2012</u>
<b>NET OPERATING LOSS</b>	<b>\$ (32,611,014)</b>	<b>\$ (34,330,971)</b>
<b>ADJUSTMENTS TO RECONCILE OPERATING INCOME TO NET CASH PROVIDED BY OPERATING ACTIVITIES:</b>		
Depreciation	\$ 5,177,241	\$ 5,103,585
Misc Non-Operating Income	109,705	140,601
<b>CHANGE IN ASSETS AND LIABILITIES:</b>		
Decrease in Advertising Receivable	1,081	(5,599)
Increase in Miscellaneous Accounts Receivable	(105,676)	(66,735)
Decrease in Inventories	121,705	(22,448)
Increase in Accrued Vacation Payable	20,256	(121,893)
Increase in Accrued Sick Leave Payable	63,716	(25,084)
Decrease in Accounts Payable	(102,074)	125,842
Increase in Wages and Benefits Payable	166,775	70,753
Increase in Deferred Inflows	29,440	6,758
<b>TOTAL ADJUSTMENTS</b>	<b>\$ 5,482,169</b>	<b>\$ 5,205,780</b>
<b>NET CASH USED BY OPERATING ACTIVITIES</b>	<b>\$ (27,128,845)</b>	<b>\$ (29,125,191)</b>

SEE ACCOMPANYING NOTES TO FINANCIAL STATEMENTS

**INTERCITY TRANSIT**  
**NOTES TO FINANCIAL STATEMENTS**  
**JANUARY 1, 2012 THROUGH DECEMBER 31, 2013**

Intercity Transit was incorporated in 1981 and operates under the laws of the state of Washington applicable to a public transportation benefit area. The financial statements of Intercity Transit have been prepared in conformity with generally accepted accounting principles (GAAP) as applied to governments.

The following summary of the significant accounting policies is presented to assist the reader. These notes should be viewed as an integral part of the accompanying financial statements.

**NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

**A. Entity:**

Intercity Transit is a special purpose government which provides fixed route, demand response and vanpool services to the general public. It is governed by a nine member board consisting of elected officials, citizen representatives and a labor representative. As required by generally accepted accounting principles, management has considered all potential component units in defining the reporting entity. Intercity Transit has no component units.

**B. Basis of Accounting and Reporting:**

Intercity Transit's accounting records are maintained in accordance with methods prescribed by the State Auditor under the authority of Chapter 43.09 RCW. Intercity Transit uses the *Budgeting, Accounting, and Reporting System for Transit Districts* in the State of Washington.

Funds are accounted for on a cost of services or an economic resources measurement focus. This means that all assets and all liabilities (whether current or noncurrent) associated with their activity are included on the statement of net position. The reported total net assets is segregated into invested in capital assets, net of related debt; and restricted and unrestricted net assets. Operating statements present increases (revenues and gains) and decreases (expenses and losses) in net total position. Intercity Transit discloses changes in cash flows by a separate statement that presents its operating, noncapital financing, capital and related financing, and investing activities.

Intercity Transit consists of a single enterprise fund and uses the full-accrual basis of accounting. Under this method, revenues are recognized in the accounting period in which they are earned and become measurable; and expenses are recognized in the period incurred, if measurable.

Enterprise funds distinguish operating revenues and expenses from non-operating items. Operating revenues and expenses generally result from providing services and producing and delivering goods in connection with an enterprise fund's principal ongoing operation. Intercity Transit's principal operating revenues are charges to customers in the form of bus and vanpool fares. Operating expenses include the cost of providing transit service, administration expenses, depreciation on capital assets, and gain/loss on sale of assets. Tax revenue, grants used to finance operations, interest, and expenses not related to the provision of transit service are reported as non-operating revenues and expenses.

Accrued revenues include sales tax, state and federal subsidies, and interest earnings. Capital grant revenues are accrued in the amount of reimbursable liabilities incurred as of year end.

**C. Budgetary Data:**

- a. The annual budget is prepared on the same basis as the statements with the exception of depreciation and accrued vacation and sick leave expense. These are items not requiring cash outlay.
- b. Appropriations lapse at year-end.
- c. Expenses cannot exceed appropriations at the total budget level. Resolution No. 04-2012 set the total 2013 budgeted revenues at \$45,786,800 and expenses at \$47,768,200. Actual revenues, including capital grants, were \$40,227,534. Actual expenses and capital outlay less depreciation and accrued vacation/sick leave expense were \$35,790,229.
- d. A resolution is required by Intercity Transit if amendments are needed to the original budget. No amendments were made to the 2013 budget.
- e. Accounts encumbered but not expended by the end of the budget year become an encumbrance of the following year's appropriations.

Detail of budgeted versus actual amounts are shown on the following page.



**SCHEDULE OF REVENUES AND NON-REVENUES: BUDGET VERSUS ACTUAL**

Year Ended December 31, 2013

	BUDGET	ACTUAL	FAVORABLE (UNFAVORABLE) VARIANCE
Passenger Fares	\$ 4,836,214	\$ 4,906,192	\$ 69,978
Advertising	298,620	321,774	23,154
Interest Income	296,610	142,073	(154,537)
Sales Tax	28,952,878	29,381,345	428,467
Operating/Capital Subsidies	11,288,902	5,348,329	(5,940,573)
Miscellaneous	113,576	109,705	(3,871)
Gain on Disposal of Assets	-	18,116	18,116
<b>TOTAL</b>	<b>\$45,786,800</b>	<b>\$40,227,534</b>	<b>(\$5,559,266)</b>

**SCHEDULE OF EXPENSES AND EXPENDITURES: BUDGET VERSUS ACTUAL**

Year Ended December 31, 2013

	BUDGET	ACTUAL	FAVORABLE (UNFAVORABLE) VARIANCE
Operations	\$ 16,243,875	\$ 16,084,290	\$ 159,586
Vehicle Maintenance	8,335,051	7,992,777	342,274
Non-Vehicle Maintenance	2,023,238	1,399,595	623,643
General & Administration	9,055,354	7,101,105	1,954,249
Capital Purchases	12,110,682	3,212,462	8,898,220
Accrued Vac/Sick Lv Expense	-	83,972	(83,972)
Depreciation	-	5,177,241	(5,177,241)
<b>TOTAL*</b>	<b>\$47,768,200</b>	<b>\$41,051,442</b>	<b>\$ 6,716,759</b>

\*Expenditures in excess of revenues were funded by reserves.

A reconciliation of the revenue and expenditures shown on the Budget vs. Actual Schedules and the Statement of Revenues, Expenses and Changes in Net Position is as follows:

REVENUES		EXPENSES	
Passenger Fares	\$ 4,906,192	Operations	\$ 16,084,290
Advertising	321,774	Vehicle Maintenance	7,992,777
Investment Interest	142,073	Non-Vehicle Maintenance	1,399,595
Miscellaneous	109,705	General & Administrative	7,101,105
Operating Subsidies	34,417,480	Accrued Vac/Sick Lv Expense	83,972
Gain on Disposal of Assets	18,116	Depreciation	5,177,241
<b>TOTAL</b>	<b>\$39,915,340</b>	<b>TOTAL</b>	<b>\$37,838,980</b>
<b>Revenues From the Budget to Actual Schedule</b>		<b>Expenditures From the Budget to Actual Schedule</b>	
Capital Grants	312,194	Capital Purchases	3,212,462
<b>TOTAL</b>	<b>\$40,227,534</b>	<b>TOTAL</b>	<b>\$41,051,442</b>

**D. Cash and Cash Equivalents:**

Cash equivalents are composed of all highly liquid investments with an original maturity of three months or less. Cash consists of cash on hand; petty cash; and demand deposits,

**E. Investments:**

Investments are carried at cost, adjusted for purchase discounts or premiums. The discounts or premiums are amortized over the holding period of the investments. See Note 3 for further information.

**F. Receivables**

At December 31, 2013 Intercity Transit had the following receivables:

<b>Accounts Receivable</b>	<b>2013</b>	<b>2012</b>
Miscellaneous	\$ 286,796	\$ 181,120
Sales Tax	5,313,305	5,182,699
Advertising	4,518	5,599
Interest in Investments	29,880	23,316
<b>TOTAL</b>	<b>\$ 5,634,499</b>	<b>\$ 5,392,734</b>
<b>Due from Government Units</b>	<b>\$ 4,308,724</b>	<b>\$ 996,961</b>

**G. Inventories:**

Inventories consist of vehicle maintenance supplies, fuel, lubricants, and oils. They are valued using the average cost method. A physical inventory was taken on November 1, 2013 with appropriate adjustments made to recorded inventories.

**H. Capital Assets:**

Property, plant and equipment with individual values of at least \$5,000 and a useful life of three years are stated at historical cost or if unknown, at fair market value. Donated capital assets are valued at their estimated market value. Improvements, which add to the value of or extend the life of the asset, are capitalized. Repairs and maintenance are expensed as incurred. Labor and other expenses incurred in the acquisition and construction of capital assets are capitalized. See Note 4 for further details.

**I. Restricted Assets:**

As of December 31, 2013, there were no restricted assets designated for specific purposes.

**J. Accumulated Unpaid Vacation and Sick Leave:**

Transit operators accumulate vacation benefits under the agreement between Intercity Transit and Amalgamated Transit Union (ATU), Local Division 1384. Maintenance employees accumulate vacation benefits under the agreement between Intercity Transit and International Association of Machinists and Aerospace Workers (IAM), Lodge No. 160. All other employees accumulate vacation benefits under Intercity Transit Policy HR-3503. Based upon the provisions of these documents, vacation benefits are accumulated per the following schedules:

<b>Transit Operators</b>		<b>Maintenance Workers</b>		<b>Other Employees</b>	
Years of Service	Vacation Hours	Years of Service	Vacation Hours	Years of Service	Vacation Hours
1	112	0-12 months	96	1	112
2	120	2nd year	104	2	120
3-4	128	3-4	112	3-4	128
5	136	5	120	5	136
6-7	144	6-7	128	6-7	144
8-10	152	8-10	136	8-10	152
11-12	160	11-13	144	11-12	160
13-16	168	14-16	152	13-16	168
17-18	176	17-18	160	17-18	176
19	184	19	168	19	184
20-25	192	20-25	176	20-25	192
26+	200	26+	184	26+	200

Non-represented employees may accumulate 360 hours of vacation; members of IAM may accumulate 340 hours of vacation; and members of ATU may accumulate 320 hours of vacation. All employees may accumulate 960 hours of sick leave. At termination employees receive cash for accrued vacation, and may receive partial pay for sick leave based on their years of service and the number of hours accrued. Intercity Transit records unpaid leave for compensated absences as an expense and liability when incurred.

**K. Comparative Data:**

Comparative financial statements have been presented in the accompanying financial statements in order to provide an understanding of changes in Intercity Transit's financial position and operations.

**NOTE 2 - STEWARDSHIP/COMPLIANCE/ACCOUNTABILITY**

As of December 31, 2013 there were no excess of expenditures over appropriations; and no violations of finance related legal and contractual provisions.

**NOTE 3 - DEPOSITS AND INVESTMENTS**

Composition of cash and cash equivalents are shown on the following page:

	<u>2013</u>	<u>2012</u>
Cash on Hand	\$ 8,650	\$ 8,950
Demand Deposits	9,500	7,000
Investments having original maturities of less than three months	24,396,321	23,380,667
<b>Cash and Cash Equivalents</b>	<b>\$24,414,471</b>	<b>\$23,396,617</b>

All bank deposits are entirely insured under FDIC limitations.

As required by State law, all investments of Intercity Transit's funds are obligations of the US. Government, the Thurston County Treasurer's Investment Pool, bankers' acceptance, or deposits with Washington State banks and savings and loan institutions. As of December 31, 2013 all the transit's investments are in the Thurston County Treasurer's Investment Pool.

The Thurston County Investment Pool (TCIP) operates on an amortized cost-book value basis rather than a net asset value (NAV) basis. All funds deposited in the pool are returned to the participant at full face value without regard to current market values of the investment pool. Earnings distributions, including any realized transactions in the pool, are distributed monthly, calculated on the average daily balance of the participant's cash in the pool. Investments are stated at amortized cost.

GASB Statement 31, relating to adjustments to financial statements to reflect the difference between amortized cost and market value, has not been implemented by the Thurston County Treasurer's Office due to its determination of immateriality to the county's financial statements.

The Thurston County Treasurer serves as the transit's treasurer. The county issues a publicly available annual financial report that includes financial statements and required supplementary information. The report may be obtained by writing to:

Thurston County Auditor  
2000 Lakeridge DR SW  
Olympia, WA 98502

Per GASB Statement 3, investments in pools managed by another government and in mutual funds need not be categorized as to credit risk.

**NOTE 4 - CAPITAL ASSETS AND RELATED DEPRECIATION**

Major expenses for capital assets, including capital leases and major repairs that increase the useful life of an asset, are capitalized. Maintenance, repairs, and minor renewals are accounted for as expenses when incurred.

All capital assets are valued at historical cost (or estimated historical cost, where historical cost is not known), or estimated market value for donated assets.

Intercity Transit has acquired certain assets with funding provided by federal financial assistance programs. Depending on the terms of the agreements involved, the federal government could retain an equity interest in those assets. Intercity Transit, however, has sufficient legal interest to accomplish the purposes for which the assets were acquired, and has included such assets within the applicable account.

Upon retirement of a capital asset, the cost and the related allowance for depreciation is removed from the property accounts. The gain or loss is reflected in non-operating income.

Costs incurred in the planning and design of projects are deferred until programs are approved or abandoned. At that time, the related costs are transferred to the asset accounts or charged to expense as appropriate. Items of plant and equipment, which are incomplete, unclassified or otherwise not in service, and therefore not subject to depreciation, are deferred until they are placed in service.

Depreciation expense is charged to operating expenses to allocate the cost of capital assets over their estimated useful lives, using the straight-line method. Individual useful lives are assigned to new assets as follows:

Land	Not Depreciated
Buildings, Facilities	10 to 30 years
Revenue Vehicles	4.5 to 12 years
Other Vehicles	3 to 5 years
Equipment, Furniture	3 to 5 years
Intangible Assets	3 to 5 years

Summaries of changes in plant, property and equipment for 2012 and 2013 are shown on the following pages:

2012 Summary of Changes

	<u>Balance</u> <u>12/31/11</u>	<u>Increases</u>	<u>Decreases</u>	<u>Balance</u> <u>12/31/12</u>
Capital assets, not being depreciated				
Land	\$5,331,565			\$5,331,565
Work in Process	6,186,898	4,837,523	2,055,269	8,969,152
<b>Total capital assets, not being depreciated</b>	<b>\$11,518,463</b>	<b>4,837,523</b>	<b>2,055,269</b>	<b>14,300,717</b>
Capital assets, being depreciated				
Administrative Vehicles	494,040	156,814	66,158	584,696
Shop Equipment	1,615,508			1,615,508
Office Equipment	11,505			11,505
IS Equipment/Software	1,177,715	224,595		1,402,310
Miscellaneous Equipment	700,226	7,060		707,286
Facilities	15,820,434			15,820,434
Revenue Equipment	33,920,826	5,374,858	1,563,152	37,732,532
Communication Equipment	5,742,209			5,742,209
<b>Total capital assets, being depreciated</b>	<b>59,482,463</b>	<b>5,763,327</b>	<b>1,629,310</b>	<b>63,616,480</b>
Less accumulated depreciation for:				
Administrative Vehicles	416,246	70,480	59,883	426,843
Shop Equipment	778,934	138,882		917,816
Office Equipment	11,505			11,505
IS Equipment/Software	799,724	113,276		913,000
Miscellaneous Equipment	463,609	72,631		536,240
Facilities	11,912,257	369,467		12,281,724
Revenue Equipment & Vanpool	16,934,731	3,520,806	1,545,718	18,909,819
Communication Equipment	2,606,378	818,043		3,424,421
<b>Total accumulated depreciation</b>	<b>33,923,384</b>	<b>5,103,585</b>	<b>1,605,601</b>	<b>37,421,368</b>
<b>Total capital assets, being depreciated, net</b>	<b>25,559,079</b>			<b>26,195,112</b>

2013 Summary of Changes

	<u>Balance</u> <u>12/31/12</u>	<u>Increases</u>	<u>Decreases</u>	<u>Balance</u> <u>12/31/13</u>
Capital assets, not being depreciated				
Land	\$5,331,565			\$5,331,565
Work in Process	8,969,152	3,112,186	3,090,894	8,990,444
<b>Total capital assets, not being depreciated</b>	<b>\$14,300,717</b>	<b>3,112,186</b>	<b>3,090,894</b>	<b>14,322,009</b>
Capital assets, being depreciated				
Administrative Vehicles	584,696	37,187	43,671	578,212
Shop Equipment	1,615,508	256,168		1,871,676
Office Equipment	11,505			11,505
IS Equipment/Software	1,402,310	131,262		1,533,572
Miscellaneous Equipment	707,286			707,286
Facilities	15,820,434			15,820,434
Revenue Equipment	37,732,532	2,766,555	1,804,516	38,694,571
Communication Equipment	5,742,209			5,742,209
<b>Total capital assets, being depreciated</b>	<b>63,616,480</b>	<b>3,191,172</b>	<b>1,848,187</b>	<b>64,959,465</b>
Less accumulated depreciation for:				
Administrative Vehicles	426,843	53,893	43,671	437,065
Shop Equipment	917,816	136,692		1,054,508
Office Equipment	11,505			11,505
IS Equipment/Software	913,000	109,101		1,022,101
Miscellaneous Equipment	536,240	69,155		605,395
Facilities	12,281,724	355,064		12,636,788
Revenue Equipment & Vanpool	18,909,819	3,635,293	1,804,516	20,740,596
Communication Equipment	3,424,421	818,043		4,242,464
<b>Total accumulated depreciation</b>	<b>37,421,368</b>	<b>5,177,241</b>	<b>1,848,187</b>	<b>40,750,422</b>
<b>Total capital assets, being depreciated, net</b>	<b>26,195,112</b>			<b>24,209,043</b>

Work in progress as of 12/31/13 consists of the following projects:

Land	\$ 0
Facilities	8,368,782
Equipment	621,662
<b>TOTAL</b>	<b>\$8,990,444</b>

**NOTE 5 - PENSION PLAN**

All Intercity Transit employees, except for personnel working less than 70 hours per month in five months in a calendar year, participate in the Public Employees' Retirement Systems (PERS) administered by the Washington State Department of Retirement Systems, under cost-sharing multiple-employer public employee defined benefit and defined contribution retirement plans. The Department of Retirement Systems (DRS), a department within the primary government of the State of Washington, issues a publicly available comprehensive annual financial report (CAFR) that includes financial statements and required supplementary information for each plan. The DRS CAFR may be downloaded from the DRS website at [www.drs.wa.gov](http://www.drs.wa.gov), or may be obtained by writing to:

Department of Retirement Systems  
 Communications Unit  
 P.O. Box 48380  
 Olympia, WA 98504-8380;

The following disclosures are made pursuant to GASB Statement 27, *Accounting for Pensions by State and Local Government Employers* and Statement No. 50, *Pension Disclosures, an Amendment of GASB Statements No. 25 and No. 27*.

### **Public Employees' Retirement System (PERS) Plans 1, 2 and 3**

#### **Plan Description**

The Legislature established PERS in 1947. Membership in the system includes: elected officials; state employees; employees of the Supreme, Appeals, and superior courts; employees of legislative committees; community and technical college, college and university employees not participating in higher education retirement programs; employees of district and municipal courts; and employees of local governments. Approximately 49 percent of PERS salaries are accounted for by state employment. PERS retirement benefit provisions are established in chapters 41.34 and 41.40 RCW and may be amended only by the State Legislature.

PERS is a cost sharing multiple-employer retirement system comprised of three separate plans for membership purposes: Plans 1 and 2 are defined benefit plans and Plan 3 is a defined benefit plan with a defined contribution component.

PERS members who joined the system by September 30, 1977 are Plan 1 members. Those who joined on or after October 1, 1977 and by either, February 28, 2002 for state and higher education employees, or August 31, 2002 for local government employees, are Plan 2 members unless they exercised an option to transfer their membership to Plan 3. PERS participants joining the system on or after March 1, 2002 for state and higher education employees, or September 1, 2002 for local government employees have the irrevocable option of choosing membership in either PERS Plan 2 or PERS Plan 3. The option must be exercised within 90 days of employment. Employees who fail to choose within 90 days default to PERS Plan 3.

PERS is comprised of and reported as three separate plans for accounting purposes: Plan 1, Plan 2/3, and Plan 3. Plan 1 accounts for the defined benefits of Plan 1 members. Plan 2/3 accounts for the defined benefits of Plan 2 members and the defined benefit portion of benefits for Plan 3 members. Plan 3 accounts for the defined contribution portion of benefits for Plan 3 members. Although members can only be a member of either Plan 2 or Plan 3, the defined benefit portions of Plan 2 and Plan 3 are accounted for in the same pension trust fund. All assets of this Plan 2/3 defined benefit plan may legally be used to pay the defined benefits of any of the Plan 2 or Plan 3 members or beneficiaries, as defined by the terms of the plan. Therefore, Plan 2/3 is considered to be a single plan for accounting purposes.

PERS Plan 1 and Plan 2 defined benefit retirement benefits are financed from a combination of investment earnings and employer and employee contributions. Employee contributions to the PERS Plan 1 and Plan 2 defined benefit plan accrue interest at a rate specified by the Director of DRS. During DRS' Fiscal Year 2013, the rate was five and one-half percent compounded quarterly. Members in PERS Plan 1 and Plan 2 can elect to withdraw total employee contributions and interest thereon upon separation from PERS-covered employment.

Plan 1 retirement benefits are vested after an employee completes five years of eligible service.

PERS Plan 1 members are eligible for retirement from active status at any age after 30 years of service, or at the age of 60 with five years of service, or at the age of 55 with 25 years of service. Plan 1 members retiring from inactive status prior to the age of 65 may receive actuarially reduced benefits.

The monthly benefit is 2 percent of the average final compensation (AFC) per year of service, but the retirement benefit may not exceed 60 percent of AFC. The AFC is the monthly average of the 24 consecutive highest-paid service credit months.

PERS Plan 1 retirement benefits are actuarially reduced to reflect the choice, if made, of a survivor option.

Plan 1 members may elect to receive an optional COLA that provides an automatic annual adjustment based on the Consumer Price Index. The adjustment is capped at 3 percent annually. To offset the cost of this annual adjustment, the benefit is reduced.

PERS Plan 1 provides duty and non-duty disability benefits. Duty disability retirement benefits for disablement prior to the age of 60 consist of a temporary life annuity. The benefit amount is \$350 a month, or two-thirds of the monthly AFC, whichever is less. The benefit is reduced by any workers' compensation benefit and is payable as long as the member remains disabled or until the member attains the age of 60, at which time the benefit is converted to the member's service retirement amount.

A member with five years of covered employment is eligible for non-duty disability retirement. Prior to the age of 55, the benefit amount is 2 percent of the AFC for each year of service reduced by 2 percent for each year that the member's age is less than 55. The total benefit is limited to 60 percent of the AFC and is actuarially reduced to reflect the choice of a survivor option. Plan 1 members may elect to receive an optional COLA amount (based on the Consumer Price Index), capped at 3 percent annually. To offset the cost of this annual adjustment, the benefit is reduced.

PERS Plan 2 members are vested after the completion of five years of eligible service. Plan 2 members are eligible for normal retirement at the age of 65 with five years of service. The monthly benefit is 2 percent of the AFC per year of service. The AFC is the monthly average of the 60 consecutive highest-paid service months. There is no cap on years of service credit; and a cost-of-living allowance is granted (based on the Consumer Price Index), capped at 3 percent annually.

PERS Plan 2 members who have 20 years of service credit and are at least 55 years of age or older are eligible for early retirement with a reduced benefit. The benefit is reduced by an early retirement factor (ERF) that varies according to age, for each year before age 65.

PERS Plan 2 members who have 30 or more years of service credit and are at least 55 years old can retire under one of two provisions, if hired prior to May 2, 2013:

- With a benefit that is reduced by 3 percent for each year before age 65, or;
- With a benefit that has a smaller (or no) reduction (depending on age) that imposes stricter return-to-work rules.

PERS Plan 2 members hired on or after May 1, 2013 have the option to retire early by accepting a reduction of 5 percent for each year of retirement before age 65. This option is available only to those who are age 55 or older and have at least 30 years of service.

PERS Plan 2 retirement benefits are also actuarially reduced to reflect the choice, if made, of a survivor option.

PERS Plan 3 has a dual benefit structure. Employer contributions finance a defined benefit component, and member contributions finance a defined contribution component. As established by Chapter 41.34 RCW, employee contribution rates to the defined contribution component range from 5 percent to 15 percent of salaries, based on member choice. Members who do not choose a contribution rate default to a 5 percent rate. There are currently no requirements for employer contributions to the defined contribution component of PERS Plan 3.

PERS Plan 3 defined contribution retirement benefits are dependent upon the results of investment activities. Members may elect to self-direct the investment of their contributions. Any expenses incurred in conjunction with self-directed investments are paid by members. Absent a member's self-direction, PERS Plan 3 contributions are invested in the Retirement Strategy Fund that assumes the member will retire at age 65.

For DRS' fiscal year 2013, PERS Plan 3 employee contributions were \$99.0 million, and plan refunds paid out were \$69.4 million.

The defined benefit portion of PERS Plan 3 provides members a monthly benefit that is 1 percent of the AFC per year of service. The AFC is the monthly average of the 60 consecutive highest-paid service months. There is no cap on years of service credit, and Plan 3 provides the same cost-of-living allowance as Plan 2.

Effective June 7, 2006, Plan 3 members are vested in the defined benefit portion of their plan after ten years of service; or after five years, if twelve months of that service are earned after age 44; or after five service credit years earned in PERS Plan 2 by June 1, 2003. Plan 3 members are immediately vested in the defined contribution portion of their plan.

Vested Plan 3 members are eligible for normal retirement at age 65, or they may retire early with the following conditions and benefits:

- If they have at least ten service credit years and are 55 years old, the benefit is reduced by an ERF that varies with age, for each year before age 65.
- If they have 30 service credit years and are at least 55 years old, and were hired before May 1, 2013, they have the choice of a benefit that is reduced by 3 percent for each year before age 65; or a benefit with a smaller (or no) reduction factor (depending on age) that imposes stricter return-to-work rules.
- If they have 30 service credit years, are at least 55 years old, and were hired after May 1, 2013, they have the option to retire early by accepting a reduction of 5 percent for each year before age 65.

PERS Plan 3 defined benefit retirement benefits are also actuarially reduced to reflect the choice, if made, of a survivor option.

PERS Plan 2 and Plan 3 provide disability benefits. There is no minimum amount of service credit required for eligibility. The Plan 2 monthly benefit amount is 2 percent of the AFC per year of service. For Plan 3, the monthly benefit amount is 1 percent of the AFC per year of service. These disability benefit amounts are actuarially reduced for each year that the member's age is less than 65, and to reflect the choice of a survivor option. There is no cap on years of service credit, and a cost-of-living allowance is granted (based on the Consumer Price Index) capped at 3 percent annually.

PERS members meeting specific eligibility requirements have options available to enhance their retirement benefits. Some of these options are available to their survivors.

A one-time duty-related death benefit is provided to the beneficiary or the estate of a PERS member who dies as a result of injuries sustained in the course of employment, or if the death resulted from an occupational disease or infection that arose naturally and proximately out of said member's covered employment, if found eligible by the Department of Labor and Industries.

From January 1, 2007 through December 31, 2007, judicial members of PERS were given the choice to elect participation in the Judicial Benefit Multiplier (JBM) Program enacted in 2006. Justices and judges in PERS Plan 1 and Plan 2 were able to make an irrevocable election to pay increased contributions that would fund a retirement benefit with a 3.5 percent multiplier. The benefit would be capped at 75 percent of AFC. Judges in PERS Plan 3 could elect a 1.6 percent of pay per year of service benefit capped at 37.5 percent of AFC.

Newly elected or appointed justices and judges who chose to become PERS members on or after January 1, 2007, or who had not previously opted into PERS membership, were required to participate in the JBM Program.

There are 1,176 participating employers in PERS. Membership in PERS consisted of the following as of the latest actuarial valuation date for the plans of June 30, 2012:

Retirees and Beneficiaries Receiving Benefits	82,242
Terminated Plan Members Entitled To But Not Yet Receiving Benefits	30,515
Active Plan Members Vested	106,317
Active Plan Members Nonvested	44,273
<b>Total</b>	<b>263,347</b>

#### Funding Policy

Each biennium, the state Pension Funding Council adopts Plan 1 employer contribution rates, Plan 2 employer and employee contribution rates, and Plan 3 employer contribution rates. Employee contribution rates for Plan 1 are established by statute at 6 percent for state agencies and local government unit employees, and 7.5 percent for state government elected officers. The employer and employee contributions for Plan 2 and the employer contribution rate for Plan 3 are developed by the Office of the State Actuary to fully fund Plan 2 and the defined benefit portion of Plan 3. Under PERS Plan 3, employer contributions finance the defined benefit portion of the plan, and member contributions finance the defined contribution portion. The Plan 3 employee contribution rates range from 5 percent to 15 percent, based on member choice. Two of the options are graduated rates dependent on the employee's age.

As a result of the implementation of the Judicial Benefit Multiplier Program in January 2007, a second tier of employer and employee rates was developed to fund, along with investment earnings, the increased retirement benefits of those justices and judges that participate in the program.

The methods used to determine the contribution requirements are established under state statute in accordance with chapters 41.40 and 41.45 RCW.

Intercity Transit's required contribution rates expressed as a percentage of current-year covered payroll as December 31, 2013 were:

Members Not Participating in JBM:

	<u>PERS Plan 1</u>	<u>PERS Plan 2</u>	<u>PERS Plan 3</u>
Employer*	9.21%**	9.21%**	9.21%***
Employee	6.00%****	4.92%****	*****

\* The employer rates include the employer administrative expense fee currently set at 0.18%.

\*\* The employer rate for state elected officials is 13.73% for Plan 1 and 9.21% for Plan 2 and Plan 3.

\*\*\* Plan 3 defined benefit portion only.

\*\*\*\* The employee rate for state elected officials is 7.50% for Plan 1 and 4.92% for Plan 2.

\*\*\*\*\*Variable from 5.0% minimum to 15.0% maximum based on rate selected by the PERS 3 member.

Members Participating in JBM:

	<u>PERS Plan 1</u>	<u>PERS Plan 2</u>	<u>PERS Plan 3</u>
Employer-State Agency*	11.71%	11.71%	11.71%**
Employer-Local Government*	9.21%	9.21%	9.21%**
Employee-State Agency	9.76%	9.80%	7.50%***
Employee-Local Government	12.26%	12.30%	7.50%***

\* The employer rates include the employer administrative expense fee currently set at 0.18%.

\*\* Plan 3 defined benefit portion only.

\*\*\* Minimum rate.

Intercity Transit and employees made the required contributions. IT's required contributions for the years ending December 31, were:

	<u>PERS Plan 1</u>	<u>PERS Plan 2</u>	<u>PERS Plan 3</u>
2013	\$36,667	\$2,064,953	\$179,313
2012	\$75,249	\$1,832,553	\$146,567
2011	\$68,481	\$1,537,399	\$128,795

The Transit's contribution in 2013 represents its full liability with the exception of an unknown contingent liability for certain employees. Intercity Transit's leave policy allows for the accumulation of 320 or more hours of leave for all employees. PERS is liable for only 30 days of leave. Certain employees are also eligible for partial payment for sick leave based on their years of service and the number of hours accrued. PERS is not liable for payment of sick leave upon retirement. A lump sum payment may be required if an employee retires with more than 30 days of vacation, and/or receives payment for sick leave, and is a member of PERS Plan I. Currently, one employee has exceeded 30 days of accrued vacation, three employees are eligible for sick leave payout, and are members of PERS 1. Intercity Transit's estimated liability for these employees is immaterial and will not have any significant effect on its financial position.

**NOTE 6 - OUTSTANDING DEBT**

Intercity Transit did not engage in any short term debt activities in 2013 and had no outstanding debt as of December 31, 2013, other than the current accounts payable, wages and benefits payable, and accrued vacation and sick leave payable per the Statement of Net Position.

**NOTE 7 - SEGMENT INFORMATION**

Intercity Transit operates as a public transportation entity. No other operation other than public transportation services is involved. Exterior and interior advertising is offered on the buses but represents an insignificant portion of the operation.



**NOTE 8 - PUBLIC ENTITY RISK POOLS**

**A. Washington State Transit Insurance Pool**

In December of 1988, Intercity Transit signed an interlocal government agreement per Chapters 48.62 and 39.34 of the Washington State RCWs, with seven public Washington transit systems for the joint purchase of liability insurance, joint self-insurance, and joint contracting for hiring of personnel to provide risk management, claims handling, and administrative services. The agreement created an agency known as the Washington State Transit Insurance Pool. Intercity Transit's commitment to the Pool was a minimum of four years. Currently, there are 24 members in the transit insurance pool.

A board of Directors consisting of a representative of each member system governs the Pool. Member systems include: Intercity Transit, Grays Harbor Transit, Kitsap Transit, Ben Franklin Transit, Clallam Transit, Jefferson Transit, Community Transit, Pacific Transit, Link Transit, Island Transit, Mason Transit, Whatcom Transit, Grant Transit and Skagit Transit, Columbia County Transit, CUBS, Everett Transit, Pullman Transit, Spokane Transit, Twin Transit, Valley Transit, Asotin Transit, Pierce Transit and Yakima Transit.

The purpose of the Pool is stabilization of present insurance costs and reduction of costs in the long term future.

The Pool self insures for the first \$1,000,000 of each auto and general liability claim and provides excess insurance with private carriers for up to eleven million above the initial \$1,000,000 on a per claim basis.

A complete annual report, including financial statements, may be obtained by writing to:

WSTIP  
2629 12<sup>th</sup> Ct SW  
Olympia, WA 98502

**B. Risk Management**

The transit maintains insurance against most normal hazards. There have been no insurance settlements that exceeded the amount of insurance coverage within the past three years.

**NOTE 9 - ACCOUNTING CHANGES**

Intercity Transit had no accounting policy changes in 2013.

**NOTE 10 - SIGNIFICANT CONTINGENCIES**

Intercity Transit has various unresolved claims and suits against it as of December 31, 2013. Management, based upon the opinion of legal counsel, is of the opinion that the ultimate resolution of these actions will not have any significant effect on the Agency's financial position or result of operations.

Intercity Transit has received several federal grants for specific purposes that are subject to review and audit. Such audits could lead to requests for reimbursements for expenditures disallowed under the terms of the grants. In the opinion of management, such disallowances, if any, will be immaterial and will not have any significant effect on the financial position of Intercity Transit.

**NOTE 11 -SUBSEQUENT EVENTS**

In 2014, various capital assets will be purchased. The amount budgeted for these capital acquisitions is more than \$22 million and includes revenue vehicles, facility enhancements, and other items.

**SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS**

**For the Year Ended December 31, 2013**

Federal Agency Name/Pass-Through Agency Name	Federal Program Name	CFDA Number	Other Award Number	Expenditures			Footnote Ref
				From Pass-Through Awards	From Direct Awards	Total Amount	
Federal Highway Administration (fhwa), Department Of Transportation/WA State Dept of Transportation	Highway Planning and Construction	20.205	LA-7619	21,733		21,733	
Federal Transit Administration (fta), Department Of Transportation/	Federal Transit_Capital Investment Grants	20.500	WA-04-0038		24,500	24,500	
Federal Transit Administration (fta), Department Of Transportation/	Federal Transit_Formula Grants	20.507	WA-95-0055		5,221	5,221	
Federal Transit Administration (fta), Department Of Transportation/	Federal Transit_Formula Grants	20.507	WA-90-0531		806,696	806,696	
Federal Transit Administration (fta), Department Of Transportation/	Federal Transit_Formula Grants	20.507	WA-90-0533		3,024,032	3,024,032	
<b>Total CFDA 20.507</b>				<b>0</b>	<b>3,835,949</b>	<b>3,835,949</b>	
Federal Transit Administration (fta), Department Of Transportation/	Job Access And Reverse Commute Program	20.516	WA-37-0009		36,544	36,544	
Federal Transit Administration (fta), Department Of Transportation/WA State Dept of Transportation	Job Access And Reverse Commute Program	20.516	GCA6822	62,961		62,961	
Federal Transit Administration (fta), Department Of Transportation/WA State Dept of Transportation	Job Access And Reverse Commute Program	20.516	GCB1610	60,444		60,444	
<b>Total CFDA 20.516</b>				<b>123,405</b>	<b>36,544</b>	<b>159,949</b>	
Department Of Energy/Thurston Regional Planning Council	Energy Efficiency and Conservation Block Grant Program (EECBG)	81.128	DE-EE0003802	15,374		15,374	
<b>Total Federal Awards Expended:</b>				<b>160,512</b>	<b>3,896,993</b>	<b>4,057,505</b>	

The accompanying notes to the Schedule of Expenditures are an integral part of this schedule

**INTERCITY TRANSIT**  
**NOTES TO THE SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS**  
**JANUARY 1, 2013 THROUGH DECEMBER 31, 2013**

**NOTE 1 - BASIS OF ACCOUNTING**

The Schedule of Expenditure of Federal Awards is prepared on the same basis of accounting as the transit's financial statements. Intercity Transit uses the accrual basis of accounting.

**NOTE 2- PROGRAM COSTS**

The amounts shown as current year expenses represent only the federal portion of the program costs. Actual program costs, including Intercity Transit's portion, may be more than shown.

## ABOUT THE STATE AUDITOR'S OFFICE

The State Auditor's Office is established in the state's Constitution and is part of the executive branch of state government. The State Auditor is elected by the citizens of Washington and serves four-year terms.

We work with our audit clients and citizens to achieve our vision of government that works for citizens, by helping governments work better, cost less, deliver higher value, and earn greater public trust.

In fulfilling our mission to hold state and local governments accountable for the use of public resources, we also hold ourselves accountable by continually improving our audit quality and operational efficiency and developing highly engaged and committed employees.

As an elected agency, the State Auditor's Office has the independence necessary to objectively perform audits and investigations. Our audits are designed to comply with professional standards as well as to satisfy the requirements of federal, state, and local laws.

Our audits look at financial information and compliance with state, federal and local laws on the part of all local governments, including schools, and all state agencies, including institutions of higher education. In addition, we conduct performance audits of state agencies and local governments as well as [fraud](#), state [whistleblower](#) and [citizen hotline](#) investigations.

The results of our work are widely distributed through a variety of reports, which are available on our [website](#) and through our free, electronic [subscription](#) service.

We take our role as partners in accountability seriously, and provide training and technical assistance to governments, and have an extensive quality assurance program.

<b>Contact information for the State Auditor's Office</b>	
<b>Deputy Director for Communications</b>	Thomas Shapley <a href="mailto:Thomas.Shapley@sao.wa.gov">Thomas.Shapley@sao.wa.gov</a> (360) 902-0367
<b>Public Records requests</b>	(360) 725-5617
<b>Main telephone</b>	(360) 902-0370
<b>Toll-free Citizen Hotline</b>	(866) 902-3900
<b>Website</b>	<a href="http://www.sao.wa.gov">www.sao.wa.gov</a>

*Intercity Transit*  
*Commonly Used Acronyms*

AAA	Area Agency for Aging
ACCT	Agency Council on Coordinated Transportation
ADA	Americans with Disabilities Act
AFC	Automatic Fare Collection System
AG	Attorney General
ANPRM	Advance Notice of Proposed Rule Making
APTA	American Public Transit Association
APTS	Advanced Public Transportation Systems
AQP	Association of Quality Participation
ATIS	Automated Trip Information system
ATU	Amalgamated Transit Union
AVLS	Automatic Vehicle Locator System
BAFO	Best and Final Offer
BARS	Budget, Accounting, Reporting System
BAT	Breath Alcohol Technician
BCC	Bicycle Commuter Contest
BoCC	Board of County Commissioners
BRCT	Blue Ribbon Commission on Transportation
BRT	Bus Rapid Transit
CAAA	Clean Air Act Amendments
CAC	Citizen Advisory Committee
CAFR	Comprehensive Annual Financial Report
CBD	Central Business District
CCC	Cut Commute Committee (internal)
CDC	Capital Development Corporation
CCDAC	Capitol Campus Design Advisory Committee
CDL	Commercial Drivers License
CMAQ	Congestion Mitigation & Air Quality
CMS	Congestion Management System
CNG	Compressed Natural Gas
COLA	Cost-of-Living Allowance
CPI	Consumer Price Index
CPSPTA	Central Puget Sound Public Transportation Account
CQI	Continuous Quality Improvement
CRAB	County Road Administration Board
CS	Customer Services
CTR	Commute Trip Reduction
CTTA	Community Transportation Association of America
D&A	Drug & Alcohol Policy/Testing
DAL	Dial-A-Lift Services
DBE	Disadvantaged Business Enterprise
DEIS	Draft Environmental Impact Statement
DOT	Department of Transportation
DR	Demand Response
DSHS	Department of Social & Health Services

DVR	Digital Video Recording
EDC	Economic Development Council
EIS	Environmental Impact Statement
EPA	Environmental Protection Agency
ESSTA	Evergreen State Specialized Transportation Association
ETC	Employer Transportation Coordinator
ETP	Employee Transportation Program
FAR	Freight Access by Rail Corridor
FEMA	Federal Emergency Management Agency
FFGA	Full Funding Grant Agreement
FG	Fixed Guideway Modernization
FHWA	Federal Highway Administration
FLHP	Federal Land Highway Program
FLMA	Family Leave Medical Act
FLSA	Fair Labor Standards Act
FMSIB	Freight Mobility Strategic Investment Board
FONSI	Findings of No Significant Impact
FOSI	Findings of Significant Impact
FR	Fixed Route
FRA	Federal Railroad Administration
FTA	Federal Transit Administration (formerly UMTA)
FFY	Federal Fiscal Year
FY	Fiscal Year
GA	General Administration (State of Washington)
GCC	Guarnateed Contract Cost
GFOA	Government Finance Officers Association
GIS	Government Information Systems
GPRA	Government Performance & Results Act
GTEC	Growth & Transportation Efficiency Center
HB	House Bill
HCT	High Capacity Transit
HOV	High Occupant Vehicle (as in "HOV" lane)
HPA	Historical Preservation Act
HPR	Highway Planning & Research
HTF	Highway Trust Fund
IAM	International Association of Machinists
IIMC	International Institute of Municipal Clerks
IS	Information Systems
ISTEA	Intermodal Surface Transportation Efficiency Act
I.T.	Intercity Transit
ITA	Intercity Transit Authority
ITE	Institute of Transportation Engineers
ITS	Intelligent Transportation Systems
IX Funds	Interstate Discretionary Funds
JARC	Job Access/Reverse Commute

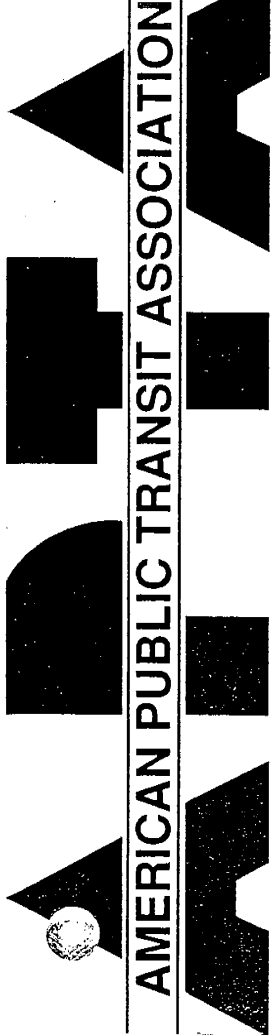
LAN	Local Area Network
LEED	Leadership in Energy & Environmental Design
LID	Local Improvement District
LMTAAA	Lewis-Mason-Thurston Area Agency on Aging
LNG	Liquid Natural Gas
LOF	Lube/Oil/Filter Change
LOS	Level of Service
LRT	Light Rail Transit
LTC	Legislative Transportation Committee
LTC	Lacey Transit Center
LTC	Leadership Thurston County
MAA	Medical Assistance Administration
MAC	Maximum Allowable Construction Cost
MBE	Minority Business Enterprise
MDBF	Mean Distance Between Failures
MDT	Mobile Data Terminals
MPO	Metropolitan Planning Organization
MPR	Milestone Progress Reports
MRSC	Municipal Research Services Center
MSA	Metropolitan Statistical Area
MTP	Metropolitan Transportation Plan
MTPPS	Multi-modal Transportation Public Projects Selection
MVET	Motor Vehicle Excise Tax
NEPA	National Environmental Policy Account
NHS	National Highway System
NTD	National Transit Database
NTI	National Transit Institute
NTS	National Transportatoin System
OCPC	Operations Communication & Policy Committee
OD	Origin Destination
OR	Operating Revenue
ORCA	One Regional Card for All
ORS	On-line Reporting System (NTD)
OTC	Olympia Transit Center
OTP	On-time Performance
PDC	Public Disclosure Commission
PERC	Public Employees Relations Commission
PIA	Public Information Act
PM	Passenger Miles
PMO	Project Management Oversight
PMSA	Primary Metropolitan Statistical Area
POP	Program of Projects
POS	Point of Sale - Pass Sales
P&R	Park-and-Ride
PSATC	Puget Sound Air Transportation Committee
PSCOG	Puget Sound Council of Governments (changed to PSRC)
PSP	Procurement Special Projects
PSRC	Puget Sound Regional Council (formerly PSCOG)

PT <sup>2</sup>	Public Transportation Partnership for Tomorrow
PTIC	Public Transportation Improvement Conference
PTBA	Public Transportation Benefit Area
RAM	Revenue Allocation Manager
RAMP	Regional Access Mobility Project
RATP	Regional Automative Trip Planning
RFIP	Regional Fare Integration Project
RFB	Request for Bid
RFP	Request for Proposals
RFQ	Request for Qualifications
RM	Rural Mobility
RMG	Regional Mobility Grant
RPC	Regional Policy Committee
ROW	Right-of-Way
RRFP	Regional Reduced Fare Permit
RTA	Regional Transportation Authority
RTID	Regional Transportatoin Improvement District
RTIP	Regional Transportation Improvement Program
RTP	Regional Transportation Plan
RTTA	Report to the Authority
SAFETEA	Safe Accountable Flexible Efficient Transportation Equity Act of 2003
SB	Senate Bill
SCAT	Service Change Advisory Team
SCATS	Service Coordination & Transit Services
SCIT	Service Change Implementation Team
SEC 3	Discretionary Grant (FTA)
SEC 9	Capital & Operating Assistance Formula Grants (FTA)
SEC 13-C	Labor Protection Language (FTA)
SEC 18	Capital & Operating Assistance in Non-Urbanized Areas (FTA)
SEPA	State Environmental Policy Act
SHPO	State Historic Preservation Office
SIP	Service Improvement Plan
SIP	State Implementation Plan
SIR	Self Insurance Retention
SMT	Senior Management Team
SOV	Single Occupant Vehicle
SP	Strategic Plan
SPEECH	South Puget Sound Environmental Education Clearinghouse
SPSCC	South Puget Sound Community College
State 105	Requires State to develop list of projects for annual process or development
STIP	Statewide Transportation Improvement Program
STP	Surface Transportation Program
TAC	Technical Advisory Committee
TAD	Transit Appreciation Day
TAZ	Traffic Analysis Zones
TCM	Transportation Control Measures
TCRP	Transit Cooperative Research Program
TDD	Telecommunications Display Device
TDFP	Transportation Development Financial Plan



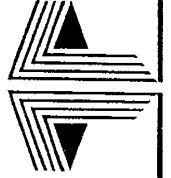
TDM	Transportation Demand Management
TDP	Transit Development Plan
TEA21	Transportation Equity Act for the 21 <sup>st</sup> Century.
TEAM	Transportation Electronic Award & Management
TESC	The Evergreen State College
TIB	Transportation Improvement Board
TIE	Transit Information Exchange
TIP	Transportation Improvement Program
Title 23	Code of Regulation Laws, as pertaining to Federal Aid to Highways
TMA	Transportation Management Area (Seattle-Everett, Tacoma, Spokane, Vancouver over 200,000 population)
TOC	Transit Operators Committee (PSRC)
TOI	Transit Orientation Index
TPB	Transportation Policy Board
TPR	Transportation Planning Regulations
TQM	Total Quality Management
TRB	Transportation Research Board
TRC	Transportation Research Center (U of W)
TRPC	Thurston Regional Planning Council
TRPP	Trip Reduction Performance Program
TSP	Transit Signal Priority
TVM	Ticket Vending Machines
TWU	Transportation Work Union
UAFP	Urbanized Area Formula Program
UGA	Urban Growth Area
UMTA	Urban Mass Transportation Administration (changed to FTA)
UPWP	Unified Planning Work Program
USDOT	United States Department of Transportation
USOA	Uniform System of Accounts
UTU	United Transportation Union
UZA	Urbanized Area
VCB	Greater Olympia Visitor Convention Bureau
VMT	Vehicles Miles Traveled
VOIMS	Vehicles Operating in Maximum Service
VP	Vanpool
VRM	Vehicle Revenue Miles
WAN	Wide Area Network
WashARP	Washington Association of Rail Passengers (also known as WARP)
WMCA	Washington Municipal Clerks Association
WSDOT	Washington State Department of Transportation
WSRO	Washington State Ridesharing Organization
WSTA	Washington State Transit Association
WSITC	Washington State Transportation Training Coalition
WTIP	Washington Transportation Policy Institute
WTTP	Washington Transit Trip Planner
WTS	Women's Transportation Seminar





# Glossary of Transit Terminology

American Public Transit Association  
1201 New York Avenue, N.W.  
Washington, DC 20005



# Glossary of Transit Terminology

*published by:*  
American Public Transit Association  
July 1994

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*produced by:*  
**APTA Governing Boards Committee**

*compiled by:*  
Peggy Glenn, APTA  
Manager, Coalitions and Advocacy

July 18, 1994

Dear Transit Colleagues:

The American Public Transit Association's Governing Boards Committee is proud to present the latest edition of the American Public Transit Association's *Glossary of Transit Terminology*.

This edition updates the previous APTA glossary that was produced in 1984 (for example, **Federal Transit Administration** has replaced **Urban Mass Transportation Administration**), and provides significant cross-references in bold typeface. This edition also gives definitions for more recent transit-related terms like **National Transportation System** and **Intermodal Surface Transportation Efficiency Act of 1991 (ISTEA)**. Finally, this glossary has been expanded to meet the specific needs of transit system board members, new employees in the industry, and citizens involved in transit activities (advisory committees, coalitions, etc.).

We recognize that transit terminology and usage differ between regions and even among transit systems. In addition, we acknowledge that this glossary is neither comprehensive, nor a substitute for the more precise technical and legal definitions that may be used in laws, regulations, contracts or other formal documents. However, this glossary is a handy reference guide that can provide basic and more specialized knowledge essential to making good policy decisions, improving transit operations, and serving customers' needs.

The Governing Boards Committee is pleased to have been part of this project, and we trust you will find the glossary to be a valuable and informative resource.

Sincerely,



Howard C. Breen  
Chairperson, APTA Governing Boards  
Committee  
Board Member, Kansas City Area  
Transportation Authority



**Accessibility**

The extent to which facilities are barrier free and useable by persons with disabilities, including wheelchair users.

**Advanced Design Bus**

See "Bus, Advanced Design."

**Advanced Public Transportation Systems (APTS)**



**Intelligent Vehicle Highway Systems (IVHS)** technology that is designed to improve transit services through advanced vehicle operations, communications, customer service and market development.

**Aerial Tramway**

An electric system of aerial cables with suspended unpowered passenger vehicles. The vehicles are propelled by separate cables attached to the vehicle suspension system and powered by engines or motors at a central location not on board the vehicle.

**Alternative Fuels**

Low-polluting fuels which are used to propel a vehicle instead of high-sulfur diesel or gasoline. Examples include methanol, ethanol, propane or compressed natural gas, liquid natural gas, low-sulfur or "clean" diesel and electricity.



**Amalgamated Transit Union (ATU)**

A major labor union representing workers in the transit industry; membership is limited to operators, mechanics and other non-supervisory employees of the transit industry.

**American Public Transit Association (APTA)**

The national, nonprofit trade association representing the public transit industry. APTA members include more than 400 public transit systems, as well as state and local departments of transportation and planning agencies, manufacturers and suppliers of transit equipment, consultants, contractors and universities.

**Americans with Disabilities Act of 1990 (ADA)**

A civil rights law passed by Congress in 1990 which makes it illegal to discriminate against people with disabilities in employment, services provided by state and local governments, public and private transportation, public accommodations and telecommunications.

**Annual Element**

Those transportation improvement projects, contained in an area's **Transportation Improvement Program (TIP)**, that are proposed for implementation in the current year. The annual element is submitted to the U.S. Department of Transportation (U.S. DOT) as part of the required planning process.

**Apportionment**

A federal budgetary term that refers to a statutorily prescribed division or assignment of funds. It is based on prescribed formulas in the law and consists of dividing authorized obligation authority for a specific program among transit systems.

**Appropriation**

A federal budgetary term that refers to an act of Congress that permits federal agencies to incur obligations and make payments out of the Treasury for specified purposes. An appropriation act is the most common means of providing budget authority, but in some cases the authorization legislation itself provides the budget authority.

**Arbitration**

A method of settling disputes where labor and management present their case to an impartial third party, called an arbitrator, who has the responsibility of deciding the case.

**Arterial Street**

A major thoroughfare, used primarily for through traffic rather than for access to adjacent land, that is characterized by high vehicular capacity and continuity of movement.

**Articulated Bus**

See "Bus, Articulated."

**Authorization**

Basic, substantive legislation which establishes or continues the legal operation of a federal program or agency, either indefinitely or for a specific period of time, or which sanctions a particular type of obligation or expenditure within a program. An authorization may set **appropriation** limits. See "Intermodal Surface Transportation Efficiency Act of 1991."

**Auto Restricted Zone (ARZ)**

An area in which normal automobile traffic is prohibited or limited to certain times, and vehicular traffic is restricted to public transit, emergency vehicles, taxicabs and, in some cases, delivery of goods.

**Automated Guideway**

An electric railway operating without vehicle operators or other crew on board the vehicle.

**Automatic Fare Collection System (AFC)**

A system of controls and equipment that automatically admits passengers on insertion of the correct fare in coins, tokens, tickets or farecards; it may include special equipment for transporting and counting revenues.

**Automatic Vehicle Location System (AVLS)**

Technology that tracks the current location of fleet vehicles to assist in dispatching, maintaining schedules, answering specific customer inquiries, etc.

**Bargaining Agent**

A labor union designated by an appropriate government agency or recognized by the employer as the exclusive representative of all employees in the bargaining unit for purposes of collective bargaining.

<b>Base Period</b>	The period between the morning and evening peak periods when transit service is generally scheduled on a constant interval. Also known as "off-peak period."	<b>Bus, Articulated</b>	A bus usually 55 feet or more in length with two connected passenger compartments that bend at the connecting point when the bus turns a corner.
<b>Base Fare</b>	The price charged to one adult for one transit ride; excludes transfer charges, zone charges, express service charges, peak period surcharges and reduced fares.	<b>Bus, Charter</b>	A bus transporting a group of persons who, pursuant to a common purpose, and under a single contract at a fixed price, have acquired the exclusive use of a bus to travel together under an itinerary.
<b>Binding Arbitration</b>	Arbitration with a final and binding award, which is often enforceable in the courts.	<b>Bus, Circulator</b>	A bus serving an area confined to a specific locale, such as a downtown area or suburban neighborhood with connections to major traffic corridors.
<b>Budget Authority</b>	A federal budgetary term that refers to legal authority given by Congress to federal agencies to make funds available for obligation or expenditure.	<b>Bus, Double Deck</b>	A bus with two separate passenger compartments, one above the other.
<b>Budget Resolution</b>	A federal budgetary term that refers to a concurrent resolution passed by both Houses of Congress, but not requiring the signature of the President, setting forth the congressional budget for each of five fiscal years. The budget resolution sets forth various budget total and functional allocations, and may include reconciliation instructions to designated House or Senate committees.	<b>Bus, Express</b>	A bus that operates a portion of the route without stops or with a limited number of stops.
<b>Bus (Motorbus)</b>	A rubber-tired, self-propelled, manually-steered vehicle with fuel supply carried on board the vehicle. Types include advanced design, articulated, charter, circulator, double deck, express, feeder, intercity, medium-size, new look, sightseeing, small, standard-size, subscription, suburban, transit and van.	<b>Bus, Feeder</b>	A bus service that picks up and delivers passengers to a rail rapid transit station or express bus stop or terminal.
<b>Bus, Advanced Design</b>	A bus introduced in 1977 that incorporates new styling and design features compared to previous buses.	<b>Bus, Intercity</b>	A bus with front doors only, high-backed seats, separate luggage compartments, and usually with restroom facilities for use in high-speed long-distance service.
		<b>Bus, Medium-Size</b>	A bus from 29 to 34 feet in length.
		<b>Bus, New Look</b>	A bus with the predominant styling and mechanical equipment common to buses manufactured between 1959 and 1978.
		<b>Bus, Sightseeing</b>	A bus adapted for sightseeing use, usually with expanded window areas.
		<b>Bus, Small</b>	A bus 28 feet or less in length.
		<b>Bus, Standard-Size</b>	A bus from 35 to 41 feet in length.



**Bus, Subscription**

A commuter bus express service operated for a guaranteed number of patrons from a given area on a prepaid, reserved-seat basis.

**Bus, Suburban**

A bus with front doors only, normally with high-backed seats, and without luggage compartments or restroom facilities for use in longer-distance service with relatively few stops.

**Bus, Transit**

A bus with front and center doors, normally with a rear-mounted engine, low-back seating, and without luggage compartments or restroom facilities for use in frequent-stop service.

**Bus, Trolley**

An electric, rubber-tired transit vehicle, manually steered, propelled by a motor drawing current through overhead wires from a central power source not on board the vehicle. Also known as "trolley coach" or "trackless trolley."

**(Bus), Van**

A 20-foot long or shorter vehicle, usually with an automotive-type engine and limited seating normally entered directly through side or rear doors rather than from a central aisle, used for demand response, vanpool, and lightly patronized motorbus service.

**Bus Discretionary Capital**

Federal funding granted under Section 3 of the Federal Transit Act (formerly known as the Urban Mass Transportation Act). These discretionary funds are used for bus-related construction projects or to replace, rehabilitate or purchase buses.

**Bus Lane**

A street or highway lane intended primarily for buses, either all day or during specified periods, but sometimes also used by carpools meeting requirements set out in traffic laws.

**Bus Shelter**

A building or other structure constructed near a bus stop, to provide seating and protection from the weather for the convenience of waiting passengers.

**Bus Stop**

A place where passengers can board or alight from the bus, usually identified by a sign.

**Busway**

Exclusive freeway lane for buses and carpools.

**Cable Car**

An electric railway operating in mixed street traffic with unpowered, individually-controlled transit vehicles propelled by moving cables located below the street surface and powered by engines or motors at a central location not on board the vehicle.

**Capital Assistance**

Financial assistance for transit capital expenses (not operating costs); such aid may originate with federal, local or state governments.

**Capital Costs**

Costs of long-term assets of a public transit system such as property, buildings, vehicles, etc.

**Carpool**

An arrangement where two or more people share the use and cost of privately owned automobiles in traveling to and from pre-arranged destinations together.

**Catenary**

An overhead contact wire system which supplies power from a central power source to an electric vehicle (such as a trolley bus; see "Bus, Trolley").

**Central Business District (CBD)**

The downtown retail trade and commercial area of a city or an area of very high land valuation, traffic flow, and concentration of retail business offices, theaters, hotels and services.

<b>Charter Bus</b>	See "Bus, Charter."	<b>Conformity</b>	The ongoing process that ensures the planning for highway and transit systems, as a whole and over the long term, is consistent with the state air quality plans for attaining and maintaining health-based air quality standards; conformity is determined by metropolitan planning organizations (MPOs) and the U.S. Department of Transportation (U.S. DOT), and is based on whether transportation plans and programs meet the provisions of a State Implementation Plan.
<b>Circulator Bus</b>	See "Bus, Circulator."	<b>Congestion Mitigation and Air Quality (CMAQ)</b>	Federal funds available for either transit or highway projects which contribute significantly to reducing automobile emissions which cause air pollution.
<b>Clean Air Act Amendments of 1990 (CAAA)</b>	The comprehensive federal legislation which establishes criteria for attaining and maintaining the federal standards for allowable concentrations and exposure limits for various air pollutants; the act also provides emission standards for specific vehicles and fuels.	<b>Contract Authority</b>	A federal budgetary term that refers to a form of budget authority permitting obligations to be incurred in advance of appropriations. Advance obligations, however, have been limited by the appropriations committees with obligation limitations.
<b>Collective Bargaining</b>	Negotiations between labor union representatives and employers to reach agreement on a contract describing such matters as wages, hours and working conditions.	<b>Contraflow Lane</b>	Reserved lane for buses on which the direction of bus traffic is opposite to the flow of traffic on the other lanes.
<b>Commitment</b>	See "Obligation."	<b>Corridor</b>	A broad geographical band that follows a general directional flow connecting major sources of trips that may contain a number of streets, highways and transit route alignments.
<b>Commuter</b>	A person who travels regularly between home and work or school.	<b>Cost-of-Living Allowance (COLA)</b>	An increase or decrease in employees' wages or salaries made on the basis of changes in agreed-upon economic indices, usually the Consumer Price Index.
<b>Commuter Rail</b>	See "Rail, Commuter."	<b>Crosstown</b>	Non-radial bus or rail service which does not enter the Central Business District (CBD).
<b>Compressed Natural Gas (CNG)</b>	An alternative fuel; compressed natural gas stored under high pressure. CNG vapor is lighter than air.		
<b>Compulsory Arbitration</b>	Arbitration that is required by law.		
<b>Conciliation</b>	See "Mediation."		

Death.

**Dedicated Funding Source**

The movement of a transit vehicle without passengers aboard; often to and from a garage or to and from one route to another.

A source of monies which by law is available for use only to support a specific purpose, and cannot be diverted to other uses.

**Demand Responsive**

Non-fixed-route service utilizing vans or buses with passengers boarding and alighting at pre-arranged times at any location within the system's service area. Also called "Dial-a-Ride."

**Department of Transportation (DOT)**

The cabinet level Department of the federal government that is responsible for administration of federal transportation programs including **public transportation**, highways, railroads, air transportation, shipping and the Coast Guard. Each state also has a department of transportation.

**Dial-a-Ride**

See "Demand Responsive."

**Disadvantaged Business Enterprise (DBE)**

A business owned and operated by one or more socially and economically disadvantaged individuals. Socially and economically disadvantaged individuals include African Americans, Hispanic Americans, Native Americans, Asian Pacific Americans or Asian Indian Americans and any other minorities or individuals found to be disadvantaged by the Small Business Administration (SBA) under Section 8(a) of the Small Business Act.

**Discretionary Spending**

A federal budgetary term that refers to any funds whose distribution is not automatic. Discretionary spending encompasses programs controlled by annual appropriations bills and is subject to the constraints imposed by the discretionary spending limits set in the balanced budget law.

**Double Deck Bus**

See "Bus, Double Deck."

**Downtime**

A period during which a vehicle is inoperative because of repairs or maintenance.

**Downtown People Mover (DPM)**

A type of automated guideway transit vehicle operating on a loop or shuttle route within the **Central Business District (CBD)** of a city.

**Dwell Time**

The scheduled time a vehicle or train is allowed to discharge and take on passengers at a stop, including opening and closing doors.

**Earmark**

A federal budgetary term that refers to the specific designation by Congress that part of a more general lump-sum appropriation be used for a particular project; the earmark can be designated as a minimum and/or maximum dollar amount.

**Elevated (Railway)**

See "Rail, Heavy."

**Environmental Impact Statement (EIS)**

A comprehensive study of likely environmental impacts resulting from major federally-assisted projects; statements are required by the **National Environmental Policy Act (NEPA)**.

**Equity, Federal Transit Funding**

A ratio of appropriated dollars between **Sections 9 and 18 (formula funds)** to **Section 3 (discretionary funds)**.

<b>Ethanol</b>	An alternative fuel; a liquid alcohol fuel with vapor heavier than air; produced from agricultural products such as corn, grain and sugar cane.	<b>Fiscal Year (FY)</b>	The yearly accounting period for the federal government which begins October 1 and ends on the following September 30. The fiscal year is designated by the calendar year in which it ends (e.g., FY 94 is from October 1, 1993 to September 30, 1994).
<b>Exclusive Right-of-Way</b>	A highway or other facility that can only be used by buses or other transit vehicles.	<b>Fixed Cost</b>	An indirect cost that remains relatively constant, irrespective of the level of operational activity.
<b>Executive Order 12372</b>	A presidential directive that furnishes guidance to federal agencies for cooperation with state and local governments in the evaluation, review and coordination of federal assistance programs and projects.	<b>Fixed Guideway Modernization</b>	See "Rail Modernization."
<b>Express Bus</b>	See "Bus, Express."	<b>Fixed Guideway System</b>	A system of vehicles that can operate only on its own guideway constructed for that purpose (e.g., rapid rail, light rail). Federal usage in funding legislation also includes exclusive right-of-way bus operations, trolley coaches and ferryboats as "fixed guideway" transit.
<b>Fare Box Recovery Ratio</b>	Measure of the proportion of operating expenses covered by passenger fares; found by dividing fare box revenue by total operating expenses for each mode and/or systemwide.	<b>Fixed Route</b>	Service provided on a repetitive, fixed-schedule basis along a specific route with vehicles stopping to pick up and deliver passengers to specific locations; each fixed-route trip serves the same origins and destinations, unlike demand responsive and taxicabs.
<b>Fare Box Revenue</b>	Value of cash, tickets, tokens and pass receipts given by passengers as payment for rides; excludes charter revenue.	<b>Flexible Funds</b>	Those federal funds which can be used for highway, transit or other transportation projects, as decided by regional Metropolitan Planning Organizations (MPOs) and state governments. Examples of such funds are the Surface Transportation Program (STP) and the Congestion Mitigation and Air Quality (CMAQ) fund.
<b>Fare Elasticity</b>	The extent to which ridership responds to fare increases or decreases.		
<b>Fare Structure</b>	The system set up to determine how much is to be paid by various passengers using a transit vehicle at any given time.		
<b>Federal Transit Administration (FTA)</b>	Formerly known as the Urban Mass Transportation Administration (UMTA); FTA is the agency of the U.S. Department of Transportation which administers the federal program of financial assistance to public transit.		
<b>Feeder Bus</b>	See "Bus, Feeder."		
<b>Ferryboat</b>	A boat providing fixed-route service across a body of water.		

## Formula Funds

Funds distributed or apportioned to qualifying recipients on the basis of formulas described in law; e.g., funds in the Section 18 program for Small Urban and Rural Transit Assistance, which are distributed to each state based on the state's percentage of national rural population. See also "Section 9."

## Fringe Parking

An area for parking usually located outside the Central Business District (CBD) and most often used by suburban residents who work or shop downtown.

## Grievance Arbitration

The process of resolving a labor dispute involving the application or interpretation of a collective bargaining agreement, by asking an impartial third party to make a decision after both labor and management have presented their cases.

## Headway

Time interval between vehicles moving in the same direction on a particular route.

## Heavy Rail

See "Rail, Heavy."

## High Occupancy Vehicle (HOV)

Vehicles that can carry two or more persons. Examples of high occupancy vehicles are a bus, vanpool and carpool. These vehicles sometimes have exclusive traffic lanes called "HOV lanes," "busways," "transitways" or "commuter lanes."

## High Speed Rail

See "Rail, High Speed."

## Highway Trust Fund

The federal trust fund established by the Highway Revenue Act of 1956; this fund has two accounts -- the Highway Account and the Mass Transit Account. Trust fund revenues are derived from federal highway-user taxes and fees such as motor fuel taxes; trust fund uses and expenditures are determined by law.

## Inclined Plane

A railway operating over exclusive right-of-way on steep grades with unpowered vehicles propelled by moving cables attached to the vehicles and powered by engines or motors at a central location not on board the vehicle.

## Intelligent Vehicle Highway Systems (IVHS)

Automated systems of highway transportation designed to improve traffic monitoring and management. IVHS includes: Advanced Public Transportation Systems (APTS), Automatic Vehicle Location System (AVLS) and "smart vehicles" which assist drivers with planning, perception, analysis and decision-making. See also "Intelligent Vehicle Highway Society of America (IVHS America)."

## Intercity Bus

See "Bus, Intercity."

## Interest Arbitration

The process of arriving at the terms of a new collective bargaining agreement, by asking an impartial third party to make rulings after both labor and management have presented their cases.

## Intermodal

Those issues or activities which involve or affect more than one mode of transportation, including transportation connections, choices, cooperation and coordination of various modes. Also known as "multimodal."

**Intermodal Surface  
Transportation  
Efficiency Act  
(ISTEA)**

The 1991 law that reauthorized the federal surface transportation program for six years. ISTEA heralded a new era in surface transportation because of the emphasis on "intermodalism," the unprecedented increases in authorized spending for transit, the ability to use some highway funds for transit (and vice versa) and the increased reliance on regional planning agencies to weigh transportation options and make decisions utilizing public participation.

**Jitney**

Privately-owned, small or medium-sized vehicle usually operated on a fixed route but not on a fixed schedule.

**Joint Development**

Ventures undertaken by the public and private sectors for development of land around transit stations or stops.

**Kiss and Ride**

A place where commuters are driven and dropped off at a station to board a public transportation vehicle.

**Layover Time**

Time built into a schedule between arrival at the end of a route and the departure for the return trip, used for the recovery of delays and preparation for the return trip.

**Level Playing Field**

A balanced approach to federal funding proportions for highway projects and transit projects; may also refer to employee transportation benefits so that the monthly, tax-free value of a transit pass is equal to that of a parking space; generally, any situation in which transit and highways receive equal treatment in federal funding and other federal procedures.

**Light Rail**

See "Rail, Light."

**Liquefied Natural  
Gas (LNG)**

An alternative fuel; a natural gas cooled to below its boiling point of -260 degrees Fahrenheit so that it becomes a liquid; stored in a vacuum bottle-type container at very low temperatures and under moderate pressure. LNG vapor is lighter than air.

**Load Factor**

The ratio of passengers actually carried versus the total passenger capacity of a vehicle.

**Magnetic Levitation  
(Mag-Lev)**

A rail transportation system with exclusive right-of-way which is propelled along a fixed guideway system by the attraction or repulsion of magnets on the rails and under the rail cars.

**Managers of  
Mobility**

Transit systems which expand their role to include services and approaches beyond traditional public transportation to include ridesharing, high occupancy vehicle programs, public education on transit's benefits and integration of land use, air quality and transportation decisions; the phrase was developed as part of the industry's Transit 2000 policy effort undertaken in the late 1980s and early 1990s.

**Mass Transit**

See "Public Transportation."

**Mass Transit  
Account**

The federal account, established by the Surface Transportation Assistance Act of 1982, into which a designated portion of the federal Highway Trust Fund revenue from motor fuel taxes is placed (1.5 cents in 1994). This account is used for federal mass transportation assistance.

**Mass**

See "Public Transportation."

**Transportation**

**Mean Distance Between Failures (MDBF)**

The average distance in miles that a transit vehicle travels before failure of a vital component forces removal of that vehicle from service.

**Mediation**

Efforts by an impartial third party to encourage agreement between a labor union and management by counseling each side and facilitating negotiations. Also known as "conciliation."

**Medium-Size Bus**

See "Bus, Medium-Size."

**Methanol**

An alternative fuel; a liquid alcohol fuel with vapor heavier than air; primarily produced from natural gas.

**Metropolitan Planning Organization (MPO)**

The organization designated by local elected officials as being responsible for carrying out the urban transportation and other planning processes for an area.

**Metropolitan Railway (Metro)**

See "Rail, Heavy."

**Minority Business Enterprise (MBE)**

A business owned and operated by one or more individuals who are defined as minorities under U.S. Department of Transportation regulations. See also "disadvantaged business enterprise."

**Modal Split**

A term which describes how many people use alternative forms of transportation. Frequently used to describe the percentage of people using private automobiles as opposed to the percentage using public transportation.

**Model**

An analytical tool (often mathematical) used by transportation planners to assist in making forecasts of land use, economic activity, travel activity and their effects on the quality of resources such as land, air and water.

**Monorail**

An electric railway in which a rail car or train of cars is suspended from or straddles a guideway formed by a single beam or rail. Most monorails are either heavy rail or automated guideway systems.

**National Environmental Policy Act of 1969 (NEPA)**

A comprehensive federal law requiring analysis of the environmental impacts of federal actions such as the approval of grants; also requiring preparation of an Environmental Impact Statement (EIS) for every major federal action significantly affecting the quality of the human environment.

**National Highway System (NHS)**

A proposed transportation system consisting of approximately 155,000 miles of highway in order to provide an interconnected system of principal arterial routes serving major population centers, major transportation facilities, major travel destinations, interstate and interregional travel and meeting national defense requirements. The NHS, defined in the Intermodal Surface Transportation Efficiency Act (ISTEA), is one component of the National Transportation System (NTS).

**National Transportation System (NTS)**

An intermodal system consisting of all forms of transportation in a unified, interconnected manner to reduce energy consumption and air pollution while promoting economic development and supporting the Nation's preeminent position in international commerce. The NTS includes the National Highway System (NHS), public transportation and access to ports and airports.

**New Look Bus**

See "Bus, New Look."

**New Start**

Federal funding granted under Section 3(i) of the Federal Transit Act (formerly known as the Urban Mass Transportation Act).

These **discretionary funds** are made available for construction of a new **fixed guideway system** or extension of any existing fixed guideway system, based on cost-effectiveness, alternatives analysis results and the degree of local financial commitment.

**Nonattainment Area**

Any geographic region of the United States that the U.S. Environmental Protection Agency (EPA) has designated as not attaining the federal air quality standards for one or more air pollutants, such as ozone and carbon monoxide.

**Obligation**

A federal budgetary term that refers to a binding agreement that will result in an **outlay**; an agreement by the federal government to pay for goods or services immediately or at some future time when the goods or services are delivered. Also known as a "commitment."

**Obligation Limitation**

A federal budgetary term that refers to a limit placed in **appropriations bills** on the amount of federal assistance that may be obligated during a specified time period. It does not affect the **scheduled apportionment** or allocation of funds; it just controls the rate at which these funds may be used.

**Off-Peak Period**

Non-rush periods of the day when travel activity is generally lower and less transit service is scheduled. Also called "**base period**."

**Operating Assistance**

Financial assistance for **transit operating expenses** (not **capital costs**); such aid may originate with federal, local or state governments.

**Operating Deficit**

The sum of all **operating expenses** minus **operating revenues**.

**Operating Expense**

Monies paid in salaries, wages, materials, supplies and equipment in order to maintain equipment and buildings, operate vehicles, rent equipment and facilities and settle claims.

**Operating Revenue**

Receipts derived from or for the operation of transit service, including **fare box revenue**, revenue from advertising, interest and **charter bus service** and operating assistance from governments.

**Outlay**

A federal budgetary term that refers to a payment made to meet an **obligation**; the point at which an actual payment of money is made.

**Paratransit**

Comparable transportation service required by the **Americans with Disabilities Act (ADA) of 1990** for individuals with disabilities who are unable to use **fixed-route** transportation systems.

**Park and Ride Lot**

Designated parking areas for automobile drivers who then board transit vehicles from these locations.

**Particulate Trap**

A filter which removes a portion of the particulates (solids, soot, etc.) from a vehicle's exhaust stream and generally includes a regenerative unit and associated control system to burn the collected solids.

**Passenger Miles**

The total number of miles traveled by passengers on transit vehicles; determined by multiplying the number of unlinked passenger trips times the average length of their trips.



**Reverse Commuting**

Movement in a direction opposite the main flow of traffic, such as from the central city to a suburb during the morning peak period.

**Ridesharing**

A form of transportation, other than public transit, in which more than one person shares the use of the vehicle, such as a van or car, to make a trip. Also known as "carpooling" or "vanpooling."

**Ridership**

The number of rides taken by people using a public transportation system in a given time period.

**Rolling Stock**

The vehicles used in a transit system, including buses and rail cars.

**Route Miles**

The total number of miles included in a fixed route transit system network.

**Section 3**

The section of the Federal Transit Act (formerly known as the Urban Mass Transportation Act of 1964), as amended, that authorizes discretionary funds for capital public transportation projects.

**Section 9**

The section of the Federal Transit Act (formerly known as the Urban Mass Transportation Act of 1964), as amended, that authorizes grants to public transportation systems in urbanized areas (population greater than 50,000) for both capital and operating programs based on formulas set out in statute.

**Section 13(c)**

The section of the Federal Transit Act (formerly known as the Urban Mass Transportation Act of 1964), as amended, related to labor protection that is designed to protect transit employees against a worsening of their position with respect to their employment as a result of grant assistance under the Act.

**Section 15**

The section of the Federal Transit Act (formerly known as the Urban Mass Transportation Act of 1964), as amended, that authorizes the U.S. Department of Transportation to gather statistical information about the financing and operations of public transportation systems, based upon a uniform system of accounts and records.

**Section 16**

The section of the Federal Transit Act (formerly known as the Urban Mass Transportation Act of 1964), as amended, that declares the national policy to be that elderly persons and persons with disabilities have the same right as other persons to utilize mass transportation facilities and services, and that special efforts shall be made in the planning and design of mass transportation facilities and services so that effective utilization by elderly persons and persons with disabilities is assured.

**Section 16(b)**

The subsection of the Federal Transit Act (formerly known as the Urban Mass Transportation Act of 1964), as amended, that authorizes grants to nonprofit corporations and associations for the specific purpose of assisting them in providing transportation services meeting the special needs of elderly persons and persons with disabilities for whom mass transportation services are unavailable, insufficient or inappropriate.

**Section 18**

The section of the Federal Transit Act (formerly known as the Urban Mass Transportation Act of 1964), as amended, that authorizes grants to public transit systems outside urbanized areas, based on formulas set out in statute; the funds go initially to the Governor of each state.

**Sequestration**

A federal budgetary term that refers to the permanent cancellation of **budget authority**.

**Shuttle**

A public or private vehicle that travels back and forth over a particular route, especially a short route or one that provides connections between transportation systems, employment centers, etc.

**Sightseeing Bus**

See "Bus, Sightseeing."

**Small Bus**

See "Bus, Small."

**Standard-Size Bus**

See "Bus, Standard-Size."

**State Implementation Plan (SIP)**

A state plan mandated by the Clean Air Act Amendments of 1990 (CAAA) that contains procedures to monitor, control, maintain and enforce compliance with national standards for air quality.

**Streetcar**

See "Rail, Light."

**Subscription Bus**

See "Bus, Subscription."

**Suburban Rail**

See "Rail, Commuter."

**Subway**

See "Rail, Heavy."

**Supplemental Appropriation**

An act appropriating funds in addition to those in an annual **appropriation** act because the need for funds is too urgent to be postponed until enactment of the next regular appropriation act.

**Trackless Trolley**

See "Bus, Trolley."

**Tramway**

See "Rail, Light."

**Transfer Center**

A fixed location where passengers interchange from one route or vehicle to another.

**Transit**

See "Public Transportation."

**Transit 2000**

An industry effort undertaken in the late 1980s and early 1990s to develop public policies allowing transit to achieve its greatest potential for the rest for the 20th century and beyond; recommendations included turning transit systems into **managers of mobility**, broadening transit's definition to include ridesharing and other **high occupancy vehicle** programs, enhancing local decision-making authority, increasing federal funding and raising the federal gasoline tax.

See "Bus, Transit."

A tax-free employee commute benefit in which an employer subsidizes up to \$60 per month for an employee's transit fares or vanpool charges. This benefit also applies to military and government employees.

**Transit System**

An organization (public or private) providing local or regional multi-occupancy-vehicle passenger service. Organizations that provide service under contract to another agency are generally not counted as separate systems.

**Transport Workers Union (TWU)**

One of the major labor unions in the transit industry; membership is limited to operators, mechanics and other non-supervisory employees of the transit industry.

**Transportation Improvement Program (TIP)**

A program of intermodal transportation projects, to be implemented over several years, growing out of the planning process and designed to improve transportation in a community. This program is required as a condition of a locality receiving federal transit and highway grants.

**Trolley Bus**

See "Bus, Trolley."

A system of fares where a transit system's service area is divided into zones within which specified rates or fares apply.

### Zone Fares

See "Rail, Light."

See "Bus, Trolley."

Funds collected and used by the federal government for carrying out specific purposes and programs according to terms of a trust agreement or statute, such as the Social Security and highway trust funds. Trust funds are administered by the government in a fiduciary capacity and are not available for the general purposes of the government. See "Dedicated Funding Source."

One of the major labor unions in the transit industry; membership is limited to operators, mechanics and other non-supervisory employees of the transit industry.

See "Federal Transit Administration (FTA)."

An U.S. Bureau of Census-designated area of 50,000 or more inhabitants consisting of a central city or two adjacent cities plus surrounding densely settled territory, but excluding the rural portion of cities.

See "(Bus), Van."

An arrangement in which a group of passengers share the use and cost of a van in traveling to and from pre-arranged destinations together.

A cost that varies in relation to the level of operational activity.

A business owned and operated by one or more women.

Trolley Car

Trolley Coach

Trust Funds

United

Transportation  
Union (UTU)

Urban Mass

Transportation  
Administration  
(UMTA)

Urbanized Area  
(UZA)

Van

Vanpool

Variable Cost

Women's Business  
Enterprise (WBE)



# INTER*city* TRANSIT

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**INTERCITY TRANSIT HUMAN RESOURCES RULES  
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## **101 – Scope and Development of Human Resources Rules**

### **1. Definition of a Human Resources Rule**

- 1.1. A Human Resources Rule is defined by all of the following criteria:
  - 1.1.1. It has broad application throughout Intercity Transit;
  - 1.1.2. It helps ensure compliance with applicable laws and regulations, promotes operational efficiencies, enhances the service delivery of Human Resources Department or reduces institutional risks;
  - 1.1.3. It mandates or constrains action;
  - 1.1.4. The subject matter requires Authority Board or General Manager review and approval for rule issuance and major changes.

### **2. Purpose of Human Resources Rules**

- 2.1. It is the purpose of these Rules to establish and maintain a uniform system for managing personnel matters; to comply with applicable employment laws; and to provide for the standards, terms, and conditions of employment with Intercity Transit in a clear and comprehensive fashion to maximize the efficiency and orderliness of operations.
- 2.2. It is further intended, by adoption and periodic amendment of these Rules, they serve as a guide for employees of Intercity Transit in their routine work activities and relationships.
- 2.3. Intercity Transit hereby asserts that it has the right to employ the best qualified persons available, and, that the continuation of employment is based on the need for work to be performed, availability of revenues, effective performance, proper on-the-job conduct, and the ability to perform the job responsibilities. Conversely, employees deserve to be fully informed of their duties and responsibilities; to be provided with adequate administrative and supervisory direction; to be informed of their performance levels; to be fairly compensated; to be considered for promotional opportunities; and to be treated with dignity and respect at all times.
- 2.4. Since it is the interest of Intercity Transit to encourage employee participation in matters that affect their work, employees are encouraged to offer suggestions for improvements to these Rules, employment practices, or working conditions. Suggestions should be made in writing to the Human Resources Director.

### **3. Scope of Human Resources Rules**

- 3.1. These Rules shall apply to all Intercity Transit employees. Employees covered or affected by these rules are responsible for knowledge of, and compliance with, the provisions contained herein. In the event of direct conflict between the provisions in these rules and provision of any law, collective bargaining agreement, or employment contract, collective bargaining agreement, the law, or employment contract shall govern when the employee is covered by such law, agreement or contract. In all other cases, these rules shall apply.
- 3.2. As may be needed for efficient and effective operations, each department of Intercity Transit may develop, implement, and revise specific procedures and departmental rules pertaining to unique operational requirements and their effect upon department employees.
  - 3.2.1. Departmental rules must be consistent with the intent of the language and procedures of these Rules.
  - 3.2.2. If conflicts arise between provisions in these Rules and department procedures, practices or rules, these Rules shall apply.

### **4. Scope of Employer Rights**

- 4.1. To ensure that Intercity Transit reserves to itself, solely and exclusively, those functions necessary for the efficient and effective operation of the organization, Intercity Transit rights may include, but are not limited to, the following:
  - 4.1.1. To manage Intercity Transit generally and to determine the issues of policy and rules.
  - 4.1.2. To determine the existence of facts on which Intercity Transit decisions are based.
  - 4.1.3. To determine the necessity for, and organization of, any service or activity conducted by Intercity Transit, and to expand or diminish services.
  - 4.1.4. To determine the nature, manner, means, technology, and extent of services to be provided.
  - 4.1.5. To determine Intercity Transit's budget, number and classification of employees, and methods of financing.
  - 4.1.6. To determine types of equipment or technology to be used.
  - 4.1.7. To determine and change the facilities, methods, technology, means, organizational structure, and size of composition of the work force, and to allocate and assign the work by which Intercity Transit operations are to be conducted.
  - 4.1.8. To determine and change the number of locations, relocations, and types of operations, processes, and materials to be used in carrying out all Intercity Transit functions, including, but not limited to, the right to contract for or subcontract any work or operation of Intercity Transit.
  - 4.1.9. To maintain order and efficiency in Intercity Transit facilities and operations.
  - 4.1.10. To establish, publish, and modify rules and practices in order to promote and/or maintain order, safety, and health at Intercity Transit.
  - 4.1.11. To take any and all necessary action to carry out the Mission of Intercity Transit.
  - 4.1.12. To determine minimum position qualifications, skills, abilities, and knowledge, selection procedures, job classifications, and employment standards.
  - 4.1.13. To hire, transfer, reclassify, assign and promote individuals based on operational needs.
  - 4.1.14. To determine policies, procedures, and standards for selection, training, and promotion of employees.
  - 4.1.15. To establish reasonable employee performance standards including, but not limited to, quality and quantity standards; and to require compliance therewith.
  - 4.1.16. To direct, assign work to, and schedule employees in accordance with requirements as determined by Intercity Transit, and to establish and change work schedules and assignments.
  - 4.1.17. To establish and modify productivity and performance programs and standards.
  - 4.1.18. To discharge, suspend without pay, reprimand, withhold salary increases based on job performance, or otherwise discipline employees.
  - 4.1.19. To lay off employees from duties because of lack of work or funds, or under conditions where continued work would be ineffective or nonproductive.
- 4.2. Under the direction of the Intercity Transit Authority, responsibility to properly and efficiently carry out the Employer Rights of Intercity Transit rests with the General Manager.

## **5. Development of Rules**

- 5.1. The following is a sequential guide for the development and issuance of new or revised Human Resources Rules. Development and/or revision of a Human Resources Rule is the responsibility of the Human Resources Director.
  - 5.1.1. A Department Director notifies Human Resources of the need for a new or revised rule.
  - 5.1.2. The Director of Human Resources determines that a new or revised rule is warranted and notifies the General Manager he/she is initiating the process for rule development. The Human Resources Director then coordinates the following steps:

- 5.1.2.1. Develops problem definition and rule direction statement
- 5.1.2.2. Identifies key stakeholders in particular rule issue
- 5.1.2.3. Assigns staff for research and drafting as may be appropriate
- 5.1.2.4. The Human Resources Director and/or staff collects and reviews data from departments, other jurisdictions and literature review of best practices.
- 5.1.3. Drafts Rule and provides to the General Manager or designee for initial approval.
- 5.1.4. Reviews Process: Rules will be distributed for review and comment to solicit feedback from identified stakeholders. Drafts of new or revised copies will be circulated to Senior Management for comment and feedback before the final rule is issued.
- 5.1.5. Sends letter to labor organizations with notification of proposed Rule. If there is a timely demand to bargain, the rulemaking process will continue concurrent with any bargaining obligations that may be extant.
- 5.1.6. Sends Final Rule to Authority or General Manager for adoption.
- 5.1.7. Adds Rule to Human Resources Rulebook.
- 5.1.8. Sends Memo to General Manager and Departments informing them of new Rule implementation.
- 5.1.9. Disseminates Rule to employees with confirmation that employees are aware of the new Rule.
- 5.1.10. Conducts Department/Work Unit training or meetings to explain new rule/procedures as needed.

## **6. Adoption of Rules**

- 6.1. Rules may be approved by the General Manager upon delegation by the Intercity Transit Authority.
  - 6.1.1. The Human Resources Director shall provide notice of the proposed action at least seven (7) calendar days prior to the effective date by distributing or mailing the notice to all department directors and each labor organization representing Intercity Transit employees.
- 6.2. Any procedural aspects not fundamentally changing the substantive content of a Human Resources Rule may be changed at the Human Resources Director's discretion as needed without prior approval of the General Manager of Intercity Transit Authority.

## **7. Review and Amendments**

- 7.1. These Rules shall be subject to no less than a bi-annual review by the Human Resources Director.
- 7.2. These Rules may be amended at any time based on the business and operational needs of Intercity Transit. Intercity Transit will endeavor to use normal communication channels to apprise employees of any amendments to these Rules as provided in Section 6.1.1 of this Rule.

## **8. Dissemination of Rules**

- 8.1. The Human Resources Director is responsible for the initial dissemination of rules once adopted.

## **9. Access to Rules**

- 9.1. Employees of the Intercity Transit shall have access to rules and procedures related to their employment.

## **10. Application of Rules**

- 10.1. These Rules shall be interpreted, applied, and enforced by supervisory employees of Intercity Transit. Intercity Transit believes the most rewarding employment relationship results from the open, fair and consistent interaction directly between employees and those that supervise or manage operations. To ensure fairness and consistency in these personnel matters, the General Manager designates the Human Resources Director to be accountable for centralized personnel operations.
- 10.2. Responsibility for interpretation, application, and enforcement rests with the Human Resources Director, who is responsible for resolving matters where questions or issues arise. The Human Resources Director shall be additionally responsible for such personnel matters as:
  - 10.2.1. As authorized, the initiation of amendments and revisions to these policies at times determined by the General Manager,
  - 10.2.2. As authorized, the initiation or revisions to job descriptions, wage and salary schedules, benefit plans and programs, and performance evaluation systems.
  - 10.2.3. Recruitment, selection evaluation, affirmative action, equal employment opportunity, and personnel records;
  - 10.2.4. Enforcement of all applicable state and federal employment laws and their resultant effect upon personnel policies and practices; and
  - 10.2.5. Other duties that may be necessary to carry out the practices and provisions of a personnel system.
- 10.3. These Rules apply to all employees
  - 10.3.1. All employees are responsible for knowledge of and compliance with the provisions contained herein.
  - 10.3.2. Bargaining unit employees and contractual employees shall only be responsible for knowledge of and compliance with the provisions in this manual which are not addressed or are not in conflict with their respective collective bargaining agreement or employment contract.
- 10.4. In the event of any conflict between the provisions of these Rules and the expressed provisions contained in any applicable collective bargaining agreement or employment contract, the collective bargaining agreement or employment contract shall govern in all cases with respect to employees covered by such agreement or contract.

## 11. Savings Clause

- 11.1. If any Human Resources Rule or its application to any person or circumstance is held invalid by operation of law or any court jurisdiction, the remaining Rules or provisions and their application to other persons or circumstances shall not be affected.

## 201 – Recruitment, Selection and Introductory Period

### 1. Scope of Rule

- 1.1. The following Rules and procedures shall apply in recruitment, selection, and appointment of applicants to position openings. Recruitment and selection procedures shall be established in accordance with the goals and objectives of Intercity Transit's Equal Employment Opportunity policy and rules.

### 2. Position Announcement

- 2.1.1. Intercity Transit is committed to hiring the best qualified person for any position opening in accordance with Intercity Transit's Equal Employment Opportunity policy and plans. Position announcements are published by the Human Resources Department and may be used to recruit for a particular vacancy or to compile a list of qualified candidates for anticipated vacancies. Announcements shall normally be circulated according to the eligible recruitment group which could include any one of the following:
  - 2.1.2. Open competitive recruitments open to current employees of Intercity Transit and interested members of the public.
  - 2.1.3. Internal agency-wide recruitments open only to all current employees of Intercity Transit.
  - 2.1.4. Internal specific recruitments open only to certain current incumbents employed by Intercity Transit.
    - 2.1.4.1. These types of recruitments are usually reserved for specific jobs which may occur within a classification "series."
- 2.2. Normally position announcements shall be posted for a minimum of ten (10) calendar days.
  - 2.2.1. An abbreviated posting of less than ten (10) calendar days may be utilized upon the request of the hiring department's director and the approval of the Human Resources Director.
- 2.3. Exceptions to the above procedures may include:
  - 2.3.1. Intercity Transit reserves the right to enter into short-term agreements with current employees (internships) or former employees, outside employment agencies, accredited schools, or other agencies or individuals to fill temporary position vacancies, resulting from temporary workload increases or the need to accomplish specific projects. Subject to the approval of the General Manager, the Human Resources Director will, in conjunction with the hiring department, determine the most appropriate manner to fill such vacancies on a case-by-case basis.
  - 2.3.2. Promotions or transfers may be by a competitive or non-competitive process. Any non-competitive promotion or transfer must be approved by the General Manager.

### 3. Application Procedure

- 3.1. Eligible applicants who meet the position standards and are interested in being considered for posted jobs shall make application for the position opening in accordance with the procedures outlined in the job announcement and any other supplemental documents provided.
- 3.2. Official application forms may be required of all applicants. All required applications must be signed by the applicant.
  - 3.2.1. An applicant's signature certifies that the information supplied on the application is true to the best of the applicant's knowledge.
- 3.3. An applicant shall be disqualified in the event it is determined that false or misleading information was provided on the employee's application form.

- 3.4. A current employee may be dismissed if it is determined that the employee provided false or misleading information at the time the employee submitted an application for employment, transfer or promotion.
- 3.5. Intercity Transit application forms may require proof of education, specialized training, legal eligibility to work in the United States, experience, driver's license or record certification, or other information appropriate to the job for which the application process applies.

#### **4. Applicant Selection**

- 4.1. The selection techniques used in the examination of prospective new or current employees shall be impartial and of a practical nature. Selection criteria shall be related to the job content and assessed in a way that reasonably measures the applicant's capability to perform those duties of the position under consideration. Factors considered in the applicant selection process may include, but are not limited to, the following:
  - 4.1.1. Timely and accurate completion of required application materials;
  - 4.1.2. Previous work experience
  - 4.1.3. Level of education (based on bona fide job requirements);
  - 4.1.4. Driver license requirements;
  - 4.1.5. Background checks;
  - 4.1.6. Performance or achievement or aptitude tests;
  - 4.1.7. Written tests or exercises;
  - 4.1.8. Medical tests that may be required;
  - 4.1.9. Work samples or, if applicable, work records;
  - 4.1.10. Personal interviews;
  - 4.1.11. Assessment Center behavior or performance results; and
  - 4.1.12. Reference checks (personal and/or professional);

#### **5. Examination Process**

- 5.1. The Human Resources Director, in conjunction with the hiring department, will determine the manner and methods of employment examinations, and will arrange for the use of necessary facilities and equipment related to the conduct of examinations.
- 5.2. No person taking an examination will be treated in any different way to any other person participating in the same examination process to the extent that such difference in treatment would compromise the impartiality of the examination process.
- 5.3. Recruitment efforts for position openings may periodically result in an unusually large number of applicants who meet the prescribed minimum qualifications. When such circumstances arise, the Human Resources Director, in consultation with the hiring department, may limit the number of applicants or candidates to advance through the examination process.
- 5.4. Persons participating in the examination process who are found to cheat, falsify information, or be disruptive to others shall be immediately disqualified from further employment consideration. If such persons are current employees, they will be subject to disciplinary action, up to and including termination of employment.
- 5.5. Under certain circumstances, the Human Resources Director may extend the recruitment period or authorize the use of supplemental examinations. Normally, this would occur when the Human Resources Director, in consultation with the hiring department determines:
  - 5.5.1. there is an insufficient number of qualified candidates available, or;
  - 5.5.2. available candidates do not meet the specific needs of the position.

#### **6. Results and Records**

- 6.1. It is the desire of Intercity Transit to make fair and impartial judgments of prospective employees, to leave a positive impression of Intercity Transit, and to be thorough in its



selection determinations. To facilitate communications between Intercity Transit representatives and interested job applicants, the Human Resources Director or designee is responsible for the timely notification of job opportunity and selection information to interested persons.

- 6.2. Records pertaining to any employment-related examination are considered confidential and proprietary documents of Intercity Transit, and shall only be divulged to a person who possesses the legal right to know in accordance with Intercity Transit POLICY EX-0005 or RCW 42.56 or other state or federal law.

## **7. Appointment to Position**

- 7.1. To be hired, a candidate must be selected by the hiring department director and approved by the General Manager. Upon approval, the hiring department in conjunction with the Human Resources Director will make an official written offer of employment to the candidate, specifying a starting date and salary/ wage.
- 7.2. If the candidate fails to respond to the offer of employment, or fails to appear on the designated starting date, the candidate is presumed to have declined the appointment.

## **8. Employment Eligibility**

- 8.1. All "offer of employment" letters sent by Intercity Transit shall include a notice advising the prospective employee that he/she are required to complete the Federal I-9 form and provide the required documents to verify identity and eligibility for employment. The "offer letter" shall advise the prospective employee of the documents considered acceptable for this requirement. Further, the "offer letter" shall advise the employee the documents must be presented to Intercity Transit Human Resources on the first day of employment
- 8.2. Applicants will not qualify for employment status until they have presented bona fide documents listed as "acceptable documents" on the I-9 form.
  - 8.2.1. A promise to obtain such documents or even a showing that such documents have been applied for by the applicant is not sufficient. If the applicant does not have the required documents, the applicant is not qualified for employment and shall not be hired until the applicant produces the required documents.
  - 8.2.2. Upon the decision of the Director of Human Resources, an applicant may be allowed a brief period of time to produce the documents necessary to complete the I-9 process.
  - 8.2.3. Failure of an applicant to submit a complete set of bona fide documents in a timely manner may, upon the decision of the Human Resources Director, disqualify the applicant and the offer of employment may be declared null and void.
- 8.3. Documents submitted by applicants for purposes of completing the I-9 process shall be carefully examined by HR staff to verify authenticity and compliance with the I-9 requirements.
- 8.4. Copies of *all* of the documents submitted by the applicants shall be made and inserted into the personnel file of the applicant/employee.

## **9. Background Checks**

- 9.1. Intercity Transit may conduct background checks of applicants during the normal recruitment process.
  - 9.1.1. While conducting a background investigation, Intercity Transit may make a preliminary offer to the selected applicant. However, any offer shall be conditional on the results of the background investigation.
- 9.2. Procedure.
  - 9.2.1. There must be a nexus (close linkage) between the assigned duties and the scope of the background investigation.

- 9.2.2. The Human Resources Director must approve the background investigation the first time it is conducted for a particular position, assignment or employee, and thereafter if significant changes are made.
- 9.2.3. The job announcement for any position where a background check is or may be required shall include a notice that a background investigation is required before hire or assignment to the position.
- 9.2.4. If an outside agency conducts the investigation, the investigation must comply with the Fair Credit Reporting Act (FCRA).
- 9.2.5. Depending on the scope of the background investigation, the applicant/employee may be required to sign a release.
- 9.2.6. The content of the background investigation is confidential unless disclosure is required under state or federal law.

## **10. Introductory Period**

- 10.1. Newly hired applicants and current employees appointed to, promoted to, or transferred to a position opening, will serve an introductory period.
- 10.2. The introductory period is an intrinsic part and extension of the employee selection process.
- 10.3. No employee shall acquire regular status until successfully completing the introductory period.
  - 10.3.1. The successful completion of the introductory period should not be construed as and does not constitute a contract guaranteeing employment with Intercity Transit for any specific duration.
- 10.4. The introductory period will normally be utilized to train and evaluate the employee's effective adjustment to work tasks, conduct, observance of rules, attendance, and job responsibilities, and to provide for the release of any employee who fails to successfully complete the introductory period.
- 10.5. Full-time and part-time employees will normally serve in an introductory period of no less than six (6) months on duty. Time spent on leave (paid or non-paid) will not qualify as time in the introductory period. Temporary employees will serve an introductory period throughout their employment.
  - 10.5.1. The Human Resources Director, in consultation with the hiring department, may establish a longer introductory period for a position based on such factors as the complexity of job tasks, unique or difficult nature of work operations, the importance of work activities and decisions, the time involved to reasonably accomplish an evaluation of full job adaptation or other reasonable factors as determined by the Human Resources Director.
  - 10.5.2. When it is deemed in the best interest of Intercity Transit to do so, the established introductory period may be extended for a specified time period at the request of the department director, subject to the approval of the General Manager. In such cases, the department director shall submit a statement of the employee's current performance levels in assigned areas of responsibility, the justification for the extension, and the amount of time such extension is needed.
- 10.6. Introductory employees must be evaluated during the introductory period.
  - 10.6.1. Introductory employee evaluations must be completed no less than fourteen (14) calendar days prior to the completion date employee's introductory period.
    - 10.6.1.1. The evaluations must reference any areas of concern in the employee's performance, workplace conduct or potential challenges to the employee's successful completion of the introductory period.

- 10.6.2. If, at the conclusion of the employee's introductory period, the employee's performance, conduct and employment conditions have been satisfactory, a recommendation to the General Manager to advance the employee to regular status will be made by the employee's department director. Such recommendation will be made at least five (5) days prior to expiration of the employee's introductory period. Upon the direction of the General Manager, the recommendation will be accompanied by a written performance evaluation. Upon approval of the General Manager, the employee shall be advised of having been advanced to regular status and be eligible for any benefits provided to their position classification.
- 10.7. Employment of a new employee may be terminated at the will and discretion of Intercity Transit at any time during the introductory period should such termination be regarded as necessary and appropriate by either the employee or Intercity Transit. The General Manager shall approve all such terminations.
- 10.7.1. In cases of introductory period release from Intercity Transit service, formal advance notice by Intercity Transit is not required.
- 10.7.2. New employees terminated during their introductory period have no rights to administratively appeal the termination.
- 10.8. A current employee, serving an introductory period owing to promotion, appointment, or transfer, whose performance or other employment conditions are determined to be unsatisfactory during this period may be reinstated to the employee's former position if available or a comparable position, or released from Intercity Transit service, the determination of which shall be made by the General Manager.

## **11. Orientation**

- 11.1. During an employee's introductory period, the hiring department will normally conduct an orientation with the employee on matters relating to: the goals and objectives of Intercity Transit; the organization and functions of Intercity Transit; the employee's role in contributing to the achievement of Intercity Transit objectives; the employee's job content and scope; training, performance and evaluation standards; promotional opportunities; job safety; and any other matter of departmental importance.
- 11.2. Within the employee's first thirty (30) days of the Human Resources Director or designee will provide an orientation consisting of the' completion of employment forms and records; an explanation of Intercity Transit's compensation and benefit programs; a review of Intercity Transit's employment policies; and any other information as determined appropriate to the employee's orientation and integration into Intercity Transit service.

## **12. Benefits During the Introductory Period**

- 12.1. New Employees
- 12.1.1. During the introductory period, a new employee hired into a position with benefits will be eligible to accrue and use paid sick leave and paid vacation that is provided in lieu of holiday leave as provided in Intercity Transit POLICY HR-3503
- 12.1.2. Regular vacation leave will accrue during the introductory period; however, a new employee is not allowed to use paid vacation leave until successful completion of his/her introductory period.
- 12.1.2.1. Requests to take unpaid time off during a new employee's introductory period must be approved by the department director.
- 12.1.3. New employees shall be eligible for insurance benefits paid for or sponsored by Intercity Transit provided they satisfy the terms and conditions of the various benefit programs as determined by Intercity Transit.
- 12.2. Promoted, Appointed or Transferring Employees

12.2.1. During the introductory period, promoted or appointed employees, including transfers, will continue to receive and use any leave and/or insurance benefits they enjoyed prior to assuming their new position.

## 202 – Employment Requirements

### 1. Medical Examinations

- 1.1. Selected applicants must successfully pass a pre-employment medical examination conducted by a physician selected by Intercity Transit. This examination shall include a drug and/or alcohol screen.
  - 1.1.1. Any offer of employment that an applicant receives from Intercity Transit is contingent upon, among other things, satisfactory completion of this examination and a determination by Intercity Transit and its examining physician that the applicant, with or without reasonable accommodation, is capable of performing the essential functions of the position offered.
  - 1.1.2. Failure on the part of an applicant to appear for a scheduled medical examination may result in denial of employment with Intercity Transit.
  - 1.1.3. Required pre-employment medical examinations are paid in full by Intercity Transit.
- 1.2. As a condition of continued employment, employees may be required to undergo medical examinations, to include drug and alcohol screening, at times specified by Intercity Transit. Such examinations shall be related to the employee's ability to perform, with or without reasonable accommodation, the essential functions of the job or for reasonable cause.
  - 1.2.1. An employee is required to provide Intercity Transit with access to his/her medical records associated with the examination, if requested by Intercity Transit.
  - 1.2.2. All Intercity Transit required medical examinations, provided by a physician selected by Intercity Transit, are paid in full by Intercity Transit.
  - 1.2.3. Failure on the part of an employee to appear for a scheduled medical examination may result in disciplinary action, to include termination of employment.

### 2. Driver's License Requirements

- 2.1. Applicants for positions in which the occupant is expected to operate a motor vehicle must be at least eighteen (18) years old, possess a valid Washington State driver's license (to include any required endorsements), and possess an acceptable driving record
  - 2.1.1. Intercity Transit reserves the right to determine what constitutes an "acceptable" driving record for each position classification.
  - 2.1.2. Applicants must be insurable under Intercity Transit insurance carrier policies.
- 2.2. As a condition of continued employment, current employees required to operate a motor vehicle must possess and maintain a valid Washington State driver's license (to include any required endorsements) and maintain an acceptable driving record throughout their employment.
  - 2.2.1. Intercity Transit reserves the right to determine what constitutes an "acceptable" driving record for each position classification.
  - 2.2.2. Employees must be, at all times, insurable under Intercity Transit insurance carrier policies.
- 2.3. The following notification rules also apply to employees operating Intercity Transit vehicles:
  - 2.3.1. In no event may an employee operate any Intercity Transit vehicle if the employee does not possess a valid driver's license and any required endorsements.
  - 2.3.2. An employee is required to report to his/her supervisor if the employee's license is suspended, revoked, or cancelled, or if the employee becomes disqualified from operating a motor vehicle. Notification must be made as soon as practicable.
  - 2.3.3. An employee required to possess and maintain a Commercial Driver's License for the operation of Intercity Transit passenger vehicles is required to notify the Department of Licensing of all out-of-state traffic convictions. Notification must be made in writing within thirty (30) days of the conviction.

- 2.4. Intercity Transit reserves the prerogative to conduct periodic reviews of motor vehicle records of employees required to operate Intercity Transit vehicles.
  - 2.4.1. Such reviews are conducted at no expense to employees.
- 2.5. Any employee in violation of this policy or who does not meet Intercity Transit's driver's license standards will be subject to disciplinary action, up to and including termination of employment.
- 2.6. Exceptions to driver license requirements may be made by the General Manager if deemed to be in the best interests of Intercity Transit and not in violation of applicable law.

## 203 – Nepotism and Fraternization

### 1. Nepotism and Fraternization

- 1.1. A member of an employee's immediate family or the employee's household or a person with whom an Intercity Transit employee has an intimate relationship will be considered for employment by Intercity Transit, provided the applicant possesses all the skills and qualifications for employment.
- 1.2. Irrespective of Section 1.1 herein, to avoid the reality or appearance of improper influence, favor or conflict of interest, and for reasons relating to supervision, safety, confidentiality and security, an immediate family member or employee household member or a person having an intimate relationship with an Intercity Transit employee may NOT be hired where:
  - 1.2.1. One immediate family member or household member would have the authority or practical power to supervise, appoint, remove, or discipline the other.
  - 1.2.2. An Intercity Transit employee having an intimate relationship with another person would have the authority or practical power to supervise, appoint, remove, or discipline the other person with whom the intimate relationship exists.
  - 1.2.3. One immediate family member or household member would be responsible for auditing the work of the other.
  - 1.2.4. An Intercity Transit employee having an intimate relationship with another person would be responsible for auditing the work of the other
  - 1.2.5. Other circumstances exist which place the immediate family members or household members or Intercity Transit employees having an intimate relationship in a situation of actual or reasonably foreseeable conflict between Intercity Transit's interest and their own.

### 2. Definitions:

- 2.1. "Immediate family member" includes: the employee's spouse, mother, father, brother, sister, child, father-in-law, mother-in-law, sister-in-law, brother-in-law, daughter-in-law, or son-in-law. These terms apply equally to natural, step, or adoptive family relationships.
- 2.2. "Employee household member" includes any individual residing in the employee's home.
- 2.3. "Intimate Relationship" includes relationships where persons are "dating" on a repeated basis, are engaged, cohabitate, or consider themselves to be domestic partners.

### 3. Change in Status During Employment:

- 3.1. Employees who marry or become immediate family members or household members or enter into an intimate relationship during Intercity Transit service may continue employment as long as:
  - 3.1.1. One immediate family member or household member or party to an intimate relationship does not and could not have the authority or practical power to supervise, appoint, remove, or discipline the other;
  - 3.1.2. One immediate family member or household member or party to an intimate relationship is not and could not be responsible for auditing the work of the other;
  - 3.1.3. No circumstance exists which would place the immediate family members or household members or party to an intimate relationship in a situation of actual or reasonably foreseeable conflict between Intercity Transit's interest and their own.
- 3.2. The above criteria will also be considered when assigning, transferring, reclassifying, or promoting an employee.
- 3.3. Should one of the above situations occur, Intercity Transit may attempt to find a suitable position within Intercity Transit to which one of the affected employees may transfer. If

arrangements of this nature are not reasonably feasible, only one of the employees will be eligible to remain in the employment of Intercity Transit.

- 3.3.1. In such situation, one of the employees will be requested to resign from Intercity Transit service. The employees involved will normally be allowed to make the decision as to which employee will resign. However, if the decision is not made by the employees within thirty (30) days notice from Intercity Transit, the General Manager will make the determination on the basis of operational necessity, and the employees will be advised accordingly.

**4. Grandparent Clause:**

- 4.1. This rule has not previously applied to employees who are parties in an intimate relationship. Therefore, this rule, as it pertains to parties having an intimate relationship, shall not apply to any Intercity Transit employment situation existing immediately upon of adoption of this rule.
- 4.2. Employees in an intimate relationship have an assertive responsibility to confer with the Human Resources Director if a reasonable person could believe that this Rule could have an adverse impact on them. Such employees shall contact the Human Resources Director within thirty (30) calendar days of the adoption of this Rule. The Human Resources Director shall then work with the involved department in exploring arrangements to mitigate the adverse impact of the rule for the involved employees.



## **204 – Separation from Employment**

### **1. Resignation**

- 1.1. An employee desiring to leave Intercity Transit service shall normally submit a written resignation to his/her director or designee at least fourteen (14) calendar days prior to the effective date of the employee's resignation, stating his/her reasons for the resignation.
- 1.2. The employee's resignation shall be forwarded immediately to the Human Resources Director or designee.
- 1.3. Upon receipt of a notice of resignation, the department director in conjunction with the Human Resources Director, shall forward a written notice to the employee indicating Intercity Transit's acknowledgement of the resignation and any terms or conditions that need to be satisfied prior to the employee's last day of employment.

### **2. Retirement**

- 2.1. Retirement provisions are governed by the state sponsored retirement program (Washington State Public Employees' Retirement System) and by the guidelines established by Intercity Transit's sponsored salary reduction and deferred compensation programs to which the employee belongs.
- 2.2. Upon receipt of a notice from an employee of the employee's intent to retire, the department director, in conjunction with the Human Resources Director, shall forward a written notice to the employee indicating Intercity Transit's acknowledgement of the notice of intent to retire and any terms or conditions that need to be satisfied prior to the employee's last day of employment.

### **3. Layoff and Recall**

- 3.1. Whenever it becomes necessary, in the sole opinion of Intercity Transit, to reduce the work force through layoffs, Intercity Transit will endeavor to provide the affected employees with at least fourteen (14) calendar day's notice of such intent. Employees shall be laid off in accordance to the operational needs of Intercity Transit as determined by the General Manager.
- 3.2. The department director, subject to the approval of the General Manager, may lay off an employee because of material change in duties or organization, abolition of position, a change in general business conditions, including the incorporation of new technologies and/or introduction of new business practices, transferring work to non-employee resources, shortage of work, funds or other circumstances as appropriate.
- 3.3. Layoff is considered a separation from Intercity Transit service. Benefits will not accrue during layoff. Unless recalled or otherwise rehired, no actions of a laid off employee are within the scope of employment with Intercity Transit
  - 3.3.1. Employees may be eligible for unemployment benefits owing to a lay-off.
- 3.4. If the employee subject to a layoff possesses a good service and conduct record, the employee's name will be placed on a recall list according to job performance and possession of special skills.
- 3.5. The recall list will be maintained for one year.
- 3.6. It is the responsibility of the employee to keep Intercity Transit informed of his/her current address and telephone number during the recall list period.
- 3.7. If an employee who has been recalled fails to report for work within fourteen (14) calendar days from the date of recall, he/she will be considered to have voluntarily resigned and will be removed from the recall list

3.8. Intercity Transit reserves the right to determine the job class and rate of pay to which an employee will be assigned if recalled to work

**4. Termination**

4.1. Employees may be subject to an involuntary disciplinary termination from employment as provided in Section 511 of the Human Resources Rules.

**5. Exit Interviews**

5.1. Except in circumstances involving a disciplinary termination, Human Resources will schedule an exit interview with each employee who separates from Intercity Transit.

5.2. The exit interview allows employees to communicate the employee's views on their work with Intercity Transit and provides the employee an opportunity to discuss issues concerning benefits and insurance.

5.3. The process for the return of any Intercity Transit property in the employee's possession and final pay arrangements will also be addressed at the time of the exit interview.

## 205 – Employee Files

### 1. Personnel File

- 1.1. An official personnel file is maintained for each Intercity Transit employee. Personnel files are the property of Intercity Transit and shall be retained in accordance with local, state, and federal law. The file's contents include, but are not limited to, application for employment, resume (if received), legal name, mailing address, telephone number, date of birth, social security number, date of hire, job title, assigned work unit, assigned salary, job classification, payroll/personnel actions, commendations, performance appraisals, discipline documentation and actions, training and safety records, termination information, and exit interviews.
- 1.2. All employees must keep Intercity Transit informed of their current address and telephone numbers. It is the employee's assertive responsibility to report any changes in address, telephone number, marital status, and dependents to the Human Resources Department.
- 1.3. An employee's personnel file is confidential. Only the employee, the employee's supervisors, HR staff, the General Manager, and Intercity Transit legal counsel shall have access to personnel files. However, personnel file materials will be disclosed to the extent compelled by law.

### 2. Department Files

- 2.1. Departments may create and maintain department employee files for the convenience of the department.
- 2.2. Department files are considered confidential, shall be located in a secured area within the department, and only authorized departmental staff shall have access to such files. However, personnel file materials will be disclosed to the extent compelled by law.
- 2.3. An employee may request to review his/her own departmental file by appointment with an authorized departmental staff.
- 2.4. Department files are not considered a part of and may not substitute for the employee's central personnel file.

### 3. Confidential Medical File

- 3.1. Information regarding an employee's medical condition or history shall be collected and maintained on separate forms and in separate medical files and shall be treated as confidential. However, medical file materials will be disclosed to the extent compelled by law. The following personnel shall have access to the confidential medical files:
  - 3.1.1. The employee shall have access to his/her own medical file;
  - 3.1.2. Human Resources staff, supervisors, and managers, on a limited need-to-know basis;
  - 3.1.3. First Aid and Safety personnel, when appropriate;
  - 3.1.4. Government officials investigating compliance with the Americans with Disabilities Act.

### 4. Access

- 4.1. Employees are entitled to review their own official personnel or confidential medical file with the Human Resources Director or designee. Employee records may not be reproduced, removed, or altered without the consent of the Human Resources Director or designee. Requests for review appointments must be scheduled in the Human Resources Department.
- 4.2. If any employee disagrees with the accuracy or content of the information contained in their personnel file, the employee may file a statement explaining their position regarding the disputed information and request the statement be included in their personnel file.

### 5. Public Disclosure

- 1 5.1. To protect the privacy of employees, no information (except for routine employment  
2 verifications as defined below under Employment Verification) from an employee's central  
3 personnel file shall be released to the public, including the media, without a written request for  
4 specific information.
- 5 5.2. Information in personnel files will not be disclosed if doing so would violate an employee's  
6 right to privacy as defined by law, unless disclosure is required by law.
- 7 5.3. The decision to release or not to release information will be made by the Human Resources  
8 Director or the Director of Executive Services with, as appropriate, the advice of counsel.
- 9 5.4. If information is released, the affected employee will be notified accordingly.

## 10 11 **6. Employment Verification**

- 12 6.1. Human Resource staff members are the only persons authorized to provide employment  
13 verifications on current or former Intercity Transit employees. Human Resources will verify  
14 employment of current or former employees upon request from a prospective employer or  
15 financial organization such as a bank, mortgage company or credit bureau.
- 16 6.2. Unless the employee has provided written consent to provide additional information, only the  
17 employee's name, dates of employment, job title, classification, pay rate and/or pay range will  
18 be released.

## 19 20 **7. Records collection and retention**

- 21 7.1. Upon the separation of an employee for any reason, all department files shall be forwarded to  
22 the Human Resources Director for collection and retention as provided herein.
- 23 7.2. Personnel records shall be retained in accordance with state law. Actual retention practices  
24 may be modified by lawsuit, statute, complaint, or to further the orderly administration of  
25 Intercity Transit.

## 206 – Employee Development

### 1. Purpose of Training and Employee Development

- 1.1. Employee training and educational or technical development are designed as integral parts of the success and efficiency of Intercity Transit's operation. A strong, dynamic training program provides the groundwork for Intercity Transit's mission "*To provide and promote transportation choices that support an accessible, sustainable, livable, prosperous community.*"
- 1.2. Intercity Transit offers training programs and other skill enhancement opportunities that:
  - 1.2.1. develop employees' knowledge, skills and abilities.
  - 1.2.2. enables employees to obtain or maintain required licenses and certifications.
- 1.3. Employee development opportunities may include, but are not limited to:
  - 1.3.1. on-the-job training
  - 1.3.2. internships
  - 1.3.3. in-house workshops
  - 1.3.4. computer-based training
  - 1.3.5. educational programs offered by colleges and universities
  - 1.3.6. workshops and seminars sponsored by other organizations or agencies, and
  - 1.3.7. other available learning courses.

### 2. Goal of Employee Development and Training

- 2.1. See POLICY-EX-0010

### 3. List of Training and Development Policies

- 3.1. *POLICY-EX-0009*: Developing Annual Training Plan
- 3.2. *POLICY-EX-0010*: Administering Training Program
- 3.3. *POLICY-EX-0011*: Attending Training
- 3.4. *POLICY-EX-0012*: Developing Training Curriculum
- 3.5. *POLICY-EX-0013*: Paying for Training Expenses
- 3.6. *POLICY-EX-0014*: Keeping Records
- 3.7. *POLICY-EX-0015*: Tracking Training

### 4. Employee Training and Development Activities Must be as Directed or Approved

- 4.1. All employee training and development activities shall be as directed by Intercity Transit or as directed or approved by the employee's director or director's designee.
- 4.2. Employees have an assertive responsibility to request prior approval for non-directed training and development activities.

### 5. Employee involvement in internship opportunities must be in accordance with a written internship curriculum plan as approved by the employee's department director *and* the director of the department in which the internship opportunity is being offered.

- 5.1. At a minimum, the internship curriculum plan shall include the following:
  - 5.1.1. learning or experience goal of the internship opportunity
  - 5.1.2. start and end date of the internship opportunity
  - 5.1.3. list of typical activities in which the intern employee will be engaged
  - 5.1.4. proposed daily schedule of the intern employee
  - 5.1.5. a communications plan between the involved departments to assure supervisory continuity and the employee's safety.
- 5.2. A copy of the written internship curriculum plan shall:

5.2.1. be filed with the Training Coordinator

## **6. Compensation for Required for Approved Training**

6.1. Employees will be compensated for time spent in required or approved training and for any travel time related thereto as provided in POLICY FA 2502

## **7. Tuition Reimbursement Program**

- 7.1. As an employer Intercity Transit is generally benefited if its employees have the opportunity to pursue desired education. To encourage employees to pursue educational opportunities, such as degree programs offered at community colleges and universities, Intercity Transit shall maintain a Tuition Reimbursement Program.
- 7.2. Employees are eligible to receive reimbursement for expenses relating to course work tuition and required books in accordance with the following:
- 7.2.1. Funds for educational training are available in the annual operating budget.
  - 7.2.2. Requests for tuition reimbursement must be made in writing, in advance, to the employee's supervisor or department director.
  - 7.2.3. All course work requires advance approval from the employee's supervisor or department director.
  - 7.2.4. Prior to payment of approved tuition and book reimbursement, the employee must provide proof of a passing grade (reflects a "C" or better), together with a copy of receipts for the course and books.
  - 7.2.5. Tuition must not be reimbursed from any other source (e.g. grants, scholarships, awards) for eligibility for Intercity Transit reimbursement payment.
  - 7.2.6. All books and other materials must be returned to Intercity Transit upon completion of the course. The Human Resources Director, in consultation with the Training Coordinator shall determine if the materials are of value to Intercity Transit or if they shall remain the property of the employee.
- 7.3. In certain circumstances, the employee's department director, in consultation with the Human Resources Director, may authorize payment for tuition and books in advance of the employee taking or completing the class. In such event, advancements will be paid through Intercity Transit's accounts payable system.
- 7.3.1. If the employee's course work is prepaid by Intercity Transit, the employee must submit proof of passing the course as defined above, or the prepaid amount will be deducted from the employee's wages.
  - 7.3.2. Failure on the employee's part to provide the required proof in a timely manner to his/her supervisor may also be grounds for disciplinary action, and may result in the employee being denied future educational training reimbursement.
- 7.4. Courses offered during the employee's normal work hours may be approved, per the above policy, if time off can be arranged without affecting the public services or disrupting departmental operations. Employees are required to make up any lost time or charge appropriate accrued leave balances per approval from their supervisor.

## **207 – Transitional Work Assignments**

### **1. Transitional Work Assignments**

- 1.1. Employees, who experience an on-the-job injury or illness which results in their temporary inability to return to the full range of duties of their regular position classification, will accept transitional work assignments if offered by the Employer.
- 1.2. Employees who experience an off-the-job injury or illness which results in their inability to return to the full range of duties of their regular position classification may be eligible for transitional work assignments if offered by the Employer and if consistent with the provisions of Title 51 RCW and implementing rules dealing with workers' compensation.
- 1.3. Transitional work assignments will consist of work which is within the restrictions outlined by the employee's health care provider. Such assignments may include, but are not necessarily limited to:
  - 1.3.1. part-time or full-time, with a temporary waiver of certain regular duties (reasonable accommodation), in an employee's regular position classification; or
  - 1.3.2. part-time or full-time in another capacity.
- 1.4. Employees assigned to transitional work assignments will receive their regular hourly rate of pay for their regular job classification for the number of hours worked in the transitional work assignment.
- 1.5. Assignment to transitional work depends upon the availability of such work and of work suitable to the employee's medical restrictions. A transitional work assignment may be terminated at any time by the Employer.
- 1.6. For employees with non-job-related injuries/illnesses, assignment to transitional work may be ended in order to provide transitional work assignment to an employee injured on-the-job.
- 1.7. Employees refusing to work transitional work assignments will not be eligible for worker's compensation benefits or paid leave benefits. Transitional work assignment for employees with workers' compensation claims or receiving workers' compensation benefits will be made consistently with the provisions of Title 51 RCW and implementing rules. To the extent consistent with Title 51 RCW and implementing rules, employees refusing to work transitional work assignments will not be eligible for workers' compensation benefits or paid leave benefits.

## **208 – Internal Committees**

### **1. Internal Standing Committees**

- 1.1. Internal Standing Committees may be constituted as required by law, regulation, labor contract or as determined and approved by the General Manager.
  - 1.1.1. Unless otherwise required by law, regulation or labor contract, the General Manager may eliminate an Internal Standing Committee at any time.
- 1.2. Each Internal Standing Committee shall have a Committee Sponsor.
  - 1.2.1. The Committee Sponsor shall be appointed by the General Manager.
- 1.3. Each Internal Standing Committee shall adopt a set of By-Laws which, at a minimum, shall include the following:
  - 1.3.1. the purpose of the committees
  - 1.3.2. the determination of membership on the committee; and
  - 1.3.3. the governance of the committee.
- 1.4. A Committee's By-Laws shall be approved by the Standing Committee and the General Manager.

### **2. Employee Involvement on Internal Committees**

- 2.1. Employee involvement on Internal Standing Committees shall be in accordance with:
  - 2.1.1. applicable law or regulation;
  - 2.1.2. the Committee's By-Laws, and;
  - 2.1.3. the approval of the employee's department director
- 2.2. Unless otherwise required by law, regulation, applicable labor contract or the Committee's By-Laws, an employee's continuing involvement on an Internal Standing Committee shall be approved by the employee's department director.
  - 2.2.1. Unless otherwise provided by law, regulation, applicable labor contract or the Committee's By-Laws, approval for an employee's involvement on an Internal Standing Committee may be revoked at any time.
- 2.3. All time spent by an FLSA "non-exempt" employee for Committee approved activities shall be considered paid time at the employee's current hourly wage.
- 2.4. The Committee Sponsor shall be responsible for oversight of Committee activities, especially those activities involving employees on paid time.
  - 2.4.1. The Committee Sponsor and the employee's department shall coordinate report procedures and management of employees engaged in paid-time activities of the Committee.

### **3. Ad Hoc Committees**

- 3.1. Ad Hoc Committees may be constituted from time to time as approved by the General Manager or designee.
- 3.2. An employee's involvement on an Ad Hoc Committee shall be approved by the employee's department director.
- 3.3. All time spent by an FLSA "non-exempt" employee for involvement on an Ad Hoc Committee shall be considered paid time at the employee's current hourly wage.
- 3.4. The Committee and the employee's department shall coordinate report procedures for employees engaged in paid-time activities of the Committee.



## **301 – Equal Employment Opportunity – Discrimination Prohibited**

### **1. Commitment to Equal Employment Opportunity**

- 1.1. Intercity Transit is an equal employment opportunity employer. Intercity Transit will recruit, hire, train, and promote into all job levels without regard to race, color, religion, gender, marital status, familial status, national origin, age, mental or physical disability, the use of a trained dog guide or service animal, sexual orientation, gender identity, genetic information, or veteran status. Intercity Transit will not disadvantage employees or discriminate in compensation or other conditions of employment in violation of this Rule and it will administer all other personnel matters in accordance with this Rule.
  - 1.1.1. Physical capacity requirements relating to minimum standards for employment may be a reasonable selection factor. However, such standards must be reasonably necessary for the specific work to be performed and uniformly applied to all applicants for the particular job category, regardless of age or sex.
  - 1.1.2. Age, gender or physical requirements may be considered if they constitute a bona fide occupational qualification (BFOQ) necessary for performance of the essential duties of the job. However, no BFOQ shall be implemented without the prior expressed approval by the Executive Director of the Washington State Human Rights Commission.
- 1.2. Unlawful discrimination is prohibited in the workplace or in any work-related setting outside the workplace. Every employee shares the responsibility for bringing to the Intercity Transit's attention conduct that interferes with providing a work environment free of illegal discrimination.
- 1.3. Officials and all employees of Intercity Transit, management and supervisory staff in particular, shall ensure that the intent and the stated requirements of this rule are implemented in all employee relations and personnel practices. It is the responsibility of every employee to ensure the work environment is free of any practice of discrimination or harassment.
- 1.4. The Human Resource Director and General Manager are responsible for implementation of the equal opportunity program.

### **2. Scope of Rule Regarding Equal Employment Opportunity**

- 2.1. Equal employment opportunity as to age applies to persons who are age 18 or older. State law forbids employment discrimination on the basis of age. It is unlawful to fail or refuse to hire or to discharge an individual or otherwise discriminate against any individual with respect to his/her compensation, terms, conditions, or privileges of employment, because of the individual's age.
- 2.2. Equal employment opportunity for persons with disabling conditions includes making a reasonable accommodation to known disabilities of a qualified disabled applicant or employee who would be able to perform the essential duties of the job if such reasonable accommodation is made.
  - 2.2.1. A written record shall be made of any accommodations made in accordance with the American Disabilities Act and retained by the Human Resources Department.

### **3. Complaint Procedure**

- 3.1. Intercity Transit provides a complaint procedure through which employees and applicants for employment may seek remedy if they believe this rule has been violated. Intercity Transit will take appropriate action to prevent discrimination, including retaliation and harassment, and to ensure that the rights of employees who file complaints are respected.

## **302 – Employees and Applicants with Disabilities**

### **1. Employees and Applicants with Disabilities**

- 1.1. It is the policy of Intercity Transit to provide reasonable accommodations to persons, employees or applicants for employment, who qualify as individuals with disabilities under the Americans with Disability Act (ADA), 1990 and the Washington State Law Against Discrimination (Chapter 49.60 RCW).
  - 1.1.1. A disability is defined under the ADA is a physical or mental impairment that substantially limits one or more major life activities, or a record of such a physical or mental impairment, or being regarded or perceived as having such impairment.
  - 1.1.2. A disability is defined under Chapter 49.60 of the RCW as the presence of a sensory, mental or physical impairment that:
    - 1.1.2.1. is medically cognizable or diagnosable; or
    - 1.1.2.2. exists as a record of history; or
    - 1.1.2.3. is perceived to exist whether or not it exists in fact
      - 1.1.2.3.1. a disability exists whether it is temporary or permanent, common or uncommon, mitigated or unmitigated, or whether or not it limits the ability to work generally or work a particular job or whether or not it limits any other activity within the scope of the applicable state law.
  - 1.1.3. A qualified individual with a disability is a person with:
    - 1.1.3.1. a sensory, mental, or physical condition that is medically diagnosable *and*,
    - 1.1.3.2. who satisfies the job requirements for educational background, employment experience, skills, licenses or any other qualification standards that are job related *and*,
    - 1.1.3.3. who is able to perform all functions that are essential to the job, with or without reasonable accommodation *and*,
    - 1.1.3.4. who is able to meet the production and performance standards of the position.

### **2. Reasonable Accommodation.**

- 2.1. Qualified individuals with disabilities have the right to request and receive reasonable accommodations in those aspects of employment that are considered necessary to perform the essential functions of the job.
  - 2.1.1. Intercity Transit will initiate an interactive process if there is a request for an accommodation from an employee or applicant.
  - 2.1.2. The Human Resources Director or his/her designee has the responsibility to receive requests for accommodation, participate in the interactive process with the employee or applicant and the affected manager, and recommend an appropriate accommodation.
  - 2.1.3. Supervisors and Managers shall document and forward to the Human Resources Director or his/her designee any initial information received from an employee about a potential qualifying disability as well as any request for an accommodation.

### **3. Notice and Responsibilities**

- 3.1. It is the responsibility of the employee or applicant to provide timely notice and documentation on the nature of their disability, work-related restrictions, and if known, the accommodations needed.
  - 3.1.1. Those who fail to provide such information may forfeit their eligibility for reasonable accommodation.
- 3.2. Intercity Transit has no obligation to create vacant positions, to offer reassignment to promotional positions or to waive job qualifications or essential functions in the

accommodation process or to make any other non-reasonable accommodations.

**4. Scope of Rule**

4.1.1. This policy does not constitute an express or implied contract, and is simply a statement of Intercity Transit's commitment to providing reasonable accommodation as appropriate to qualified persons with disabilities.

## 401 – Classification Plan

### 1. Plan Structure

- 1.1. To develop and maintain a clear structure of job responsibility and to keep meaningful the relatedness of an employee's job to pay, performance and other employment conditions, Intercity Transit adopted a classification plan for all regular positions. The plan groups positions together in classifications according to such considerations as similar work, similar qualifications, or similar pay. The classification plan includes the development of job descriptions and the allocation of employees to available positions in the best interests of Intercity Transit. Salary and wage assignments are determined in conjunction with the development of the compensation plan, and at other times as determined appropriate by the General Manager.
- 1.2. Job descriptions and the allocation of employees to positions may be revised or altered from time to time at the discretion of Intercity Transit as a means of operational efficiency and the changing nature of conducting business. Position allocations will be made within the parameters established in Intercity Transit's annual operating budget, or as otherwise approved by the Intercity Transit Authority.
- 1.3. The Human Resources Director is responsible for preparing and maintaining Intercity Transit's classification plan with the aid and assistance of supervisors and employees. The plan shall normally be subject to review once every two (2) years by the Human Resources Director. Any recommendations to amend or revise the plan will be made to the General Manager, subject to the approval of the Intercity Transit Authority.

### 2. Job Descriptions

- 2.1. Job descriptions on all positions are maintained by the Human Resources Director. Intercity Transit's classification plan shall not be construed to restrict or confine job responsibility assignments to employees where job related activities are implemented.
- 2.2. Job descriptions cover only the general character and attributes common to positions being described. Job descriptions are not intended to be exhaustive or restrictive.
  - 2.2.1. An employee may not refuse assigned work because it is not explicitly included in the employee's job description.

### 3. New Positions

- 3.1. New positions are those in which there is an identified, justified and approved list of job tasks and qualification standards sufficiently different from existing position descriptions, or the position is in addition to positions of the existing work force.
- 3.2. Requests for new positions must be submitted to the General Manager and will be subject to the approval of the Intercity Transit Authority. Upon approval, a job description will be prepared and a pay rate established for the position prior to filling the position.

### 4. Position Reclassification

- 4.1. Positions whose duties and responsibilities changed significantly from an assigned job description or positions that have been structurally affected by organizational changes may be subject to reclassification.
- 4.2. Position reclassification shall be subject to the following procedure:
  - 4.2.1. Reclassification requests shall be submitted to the Human Resources Director and shall be substantiated in writing with specific detail as to the duties and responsibilities being performed continuously that are different in scope from those contained in the employee's current job description.

- 4.2.2. Only a department director may make a request for a reclassification review. However, employees may request a review of their position responsibilities by contacting their department director. Such cases must be supported by the department director prior to reclassification review by the Human Resources Director.
  - 4.2.2.1. In all cases of reclassification review requests, it should be noted that the presence of job performance attributes greater than those required is not, in itself, sufficient justification for reclassification.
- 4.2.3. Upon receipt of a reclassification request, the Human Resources Director shall consult with the department director and review the request. The review may include, but is not limited to, the following:
  - 4.2.3.1. Addition or deletion of duties and responsibilities;
  - 4.2.3.2. Growth of a position by gradual addition or significant expansion of duties and responsibilities;
    - 4.2.3.2.1. A higher performing incumbent is not determinative on whether the position has had an expansion of duties and/or responsibilities.
  - 4.2.3.3. Changes in the desirable qualifications for the position; or
  - 4.2.3.4. Consolidation, reorganization, or reassignment of the position which significantly changes the position.
- 4.3. Upon a determination by the Human Resources Director that the classification review more likely than not supports a reclassification, the Human Resources Director shall make a recommendation to the General Manager to proceed with an evaluation of the position by the Intercity Transit Job Evaluation Committee and the General Manager in consultation with the senior managers. Upon concurrence of the General Manager, the Human Resources Director and the Job Evaluation Committee, the members of the Committee shall evaluate the position for appropriate job classification. A report of the Committee's recommendations shall be submitted to the General Manager.
- 4.4. Position reclassifications require the approval of the General Manager. Should a reclassification evaluation involve the creation of a new job description, the General Manager may approve the reclassification pending final development of the new job description and pay rate.

## **5. Fair Labor Standards Act Status**

- 5.1. Each classification is also evaluated and assigned an exempt or non-exempt status per Fair Labor Standards Act by the Human Resources Director.

## **6. Effect of Reclassification**

- 6.1. If the incumbent employee meets the requirements of the reclassified position, the employee will be reclassified to the position and the employee's wages will be determined in accordance with the placement schedule as defined below. If the employee does not meet the position requirements, the department director and the Human Resources Director, subject to the approval of the General Manager, will determine the proper placement of the employee, and the method and means of filling the position.
  - 6.1.1. There is no guarantee of continued work for an incumbent employee who does not meet the qualifications for the reclassified position.
- 6.2. An employee's pay increase date will not be affected by a reclassification, provided the employee has not reached (or does not exceed) the maximum step in his/her new pay grade.
- 6.3. Placement in the pay grade for reclassified incumbents shall be as follows:
  - 6.3.1. When the incumbent's position is reclassified to a higher pay grade, incumbent employee will receive a pay increase as provided in Section 7 herein.

- 6.3.1.1. In some cases, the General Manager may approve a higher pay advance for the employee based on such factors as the employee's qualifications and experience for the position.
- 6.3.2. If an incumbent employees' existing pay falls within the limits of the new pay range, the employee will be eligible to receive future pay increases until the top of the new pay scale is reached.
- 6.3.3. If an incumbent employee's current pay is above the limit of the new pay grade, the incumbent employee's salary will be ineligible for any salary adjustments of any kind until such time as periodic adjustments to the pay range that may occur cause the pay range to exceed the pay rate of the employee.
- 6.3.4. If a reclassification places an employee in the same pay grade, there is no change to the employee's pay.

## **7. Promotion, Appointment, Transfer, Reclassification or Demotion**

- 7.1. Placement of a non-represented employee into a new pay grade due to promotion, appointment, transfer, or demotion, will be in accordance with the procedure contained in Section 6 herein; subject to the following:
  - 7.1.1. If the employee has been placed into a higher pay grade owing to a promotion, appointment, assignment to work-at-a-higher-class or transfer, the promoted or reassigned employee shall be placed at a step in the promotional pay grade that represents a minimum of a five percent (5%) increase from the employee's pre-promotional (or status quo) rate subject to the limitation contained in Section 401.7..
  - 7.1.2. If the employee has been placed in a lower pay grade owing to a demotion and the employee's current salary is above the maximum new pay grade, the incumbent employee will be placed at the maximum step of the new pay grade.
  - 7.1.3. In a promotion, appointment, transfer, or demotion case, an incumbent employee is not authorized to exceed the new pay grade maximum step.
- 7.2. Placement of an employee into a new pay grade resulting from the employee moving from a represented position to a non-represented position shall be subject to the conditions contained in Section 402.5

## 402 – Pay Plan

### 1. Plan Purpose

- 1.1. It is the policy of Intercity Transit to compensate employees in a competitive and equitable manner in order to promote the recruitment and retention of well qualified and capable employees. To meet this objective, Intercity Transit has established the pay plan, provisions, and standards for employee compensation as follows:

### 2. Scope of Plan

- 2.1. This pay plan shall be applicable to employees of Intercity Transit who are not in a collective bargaining unit.
- 2.2. For those employees who are members of a collective bargaining unit, salary and/or wages as well as the rules governing employee pay shall be as contained in the expressed terms of the operative labor *Agreement*.

### 3. Salary and Wage Tables

- 3.1. The Human Resources Director shall prepare appropriate salary and/or wage tables for all classes of positions.
  - 3.1.1. The compensation provided to the General Manager shall be determined by the Intercity Transit Authority.
- 3.2. For each separate job class, the salary or wage table will consist of a base salary and range, or an hourly wage rate and range.
  - 3.2.1. Generally, job classes assigned to ranges will have a minimum, midpoint, and maximum rate of pay.
- 3.3. In determining compensation rates, consideration shall be given to, but not necessarily be limited to, such factors as:
  - 3.3.1. The average rate of pay for comparable work in similar employments, including conditions of work;
  - 3.3.2. Appropriate cost-of-living or market adjustments;
  - 3.3.3. Internal consistency of relationships between pay and collective worth of each class of work;
  - 3.3.4. The equitability of pay between classes of work having the same or substantially similar duties, responsibilities, requirements, and conditions of work;
  - 3.3.5. The organization's economic condition; and
  - 3.3.6. The available supply of persons meeting the organization's particular needs and requirements.

### 4. Rates of Pay

- 4.1. Employees are paid within the limits-of the pay ranges to which their positions are assigned and as provided as follows:
  - 4.1.1. Pay rates for employees considered "full-time" are based on forty (40) hours of work per week, or two-thousand eighty (2,080) hours of work per year. Employees are assigned pay grades in accordance with Intercity Transit's pay plan.
  - 4.1.2. Pay rates for part-time employees are proportionate to the full-time pay scale for the same classification. Base compensation pay rates for part-time employees working in classifications different from that of full-time employees will be established by the Human Resources Director in consultation with the hiring department, subject to the approval of the General Manager. Temporary employees, whether full-time or part-time, will have their base compensation pay rate established by the Human Resources Director in consultation with the hiring department, subject to the approval of the General Manager.

- 4.1.3. Employees on temporary assignment to another department and/or serving an internship will continue to receive their regular rate of pay during the assignment or internship.

## **5. Starting Pay**

- 5.1. Entry level employees will normally be hired at a starting pay rate equal to the minimum rate assigned to the position.
- 5.2. An employee may be hired at, or appointed to, a pay rate higher than the minimum, but generally not greater than the midpoint of the classification's pay scale when experience, training or proven capability warrant, or when prevailing market conditions require a starting pay rate greater than the minimum.
  - 5.2.1. Starting pay rates above the minimum must be approved by the General Manager.

## **6. Adjustments Owing to Inequitable Conditions**

- 6.1. The General Manager may authorize pay rate adjustments when inequitable conditions are found as a result of the administration of Intercity Transit's pay plan. Such adjustments shall be approved by the Intercity Transit Authority.

## **7. General Wage Adjustments**

- 7.1. Employees are eligible to receive general wage adjustments as approved in, and within the parameters established in, the annual operating budget or other mechanism adopted by the Intercity Transit Authority.

## **8. Step Increases**

In addition to Intercity Transit's periodic general wage adjustments referenced above, Intercity Transit employees, excluding the General Manager, are eligible for step increases as shown in "Structure Model 4" of the 2004 Intercity Transit Salary Survey Report.

- 8.1. An eligible employee shall normally receive a two-step increase in July of each year provided however, the increase may not exceed the pay classification.\*
  - 8.1.1. Employees in the introductory period shall be considered eligible to receive a step increase on July 1 regardless of when hired. However, such a step increase shall not be considered determinative of an employee's successful progress through the probationary period.
- 8.2. Temporary employees and the General Manager are not eligible for step increases.

## **9. Working In A Higher Classification**

- 9.1. Additional compensation may be granted to an employee for performing higher-level job responsibilities than the employee's normal classification. Factors considered when determining the eligibility and the amount of additional compensation is normally based on a number of considerations, including, but not necessarily limited to the following:
  - 9.1.1. The employee's ability and qualifications to perform the higher-level job responsibilities;
  - 9.1.2. Whether the employee would be required to perform routine work or a significant range of the higher-level job responsibilities;
  - 9.1.3. Whether the higher-level job responsibilities are in direct line and job scope of the lower position; and
  - 9.1.4. The length of time necessary (a minimum of thirty [30] calendar days is required) for an employee to perform at the higher job level.

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\* This refers to two steps as shown on the "Structure Model 4" as referenced above. However, in no event would an employee receive a pay rate that exceeds the maximum of the pay range.



- 9.2. Authorization for an assignment of work in a higher position must be given in writing by the department director and approved in advance by the General Manager, or in the case of the General Manager position, approved in advance the Authority Chair.
- 9.3. Conditions governing compensation for work in a higher classification include the following:
  - 9.3.1. Compensation in excess of an employee's base rate will be authorized if the employee is qualified to perform in the higher position, and required to perform at least a substantial range of more essential tasks of the higher position. Eligible employees shall receive additional compensation for the actual number of hours worked in the higher position.
  - 9.3.2. If an employee is temporarily assigned to perform in a higher classification, but such assigned duties are generally within the scope of the employee's regular classification, additional compensation is not warranted.
  - 9.3.3. The compensation of an employee in a position that is reclassified owing to higher work assignment will be determined in accordance with the placement schedule defined in HRR 401.6 (Effect of Reclassification).

## 403 – Hours of Work

### 1. Workweek

- 1.1. The standard workweek is a seven (7) consecutive calendar day period beginning at 12:01 a.m. on the first day and ending at 12:00 midnight on the seventh consecutive calendar day thereafter.

### 2. Work Schedule

- 2.1. A normal work schedule for a full-time employee consists of forty (40) hours each workweek.
- 2.2. Work schedules for individual employees may be adopted and modified by department directors. Hours may be rearranged, adjusted or staggered as needed to cover office hours, emergency situations, special project assignments, meeting requirements, and other operational concerns.
  - 2.2.1. No employee in a position determined to be "non-exempt" (and thereby eligible for overtime compensation) under the Fair Labor Standards Act may be regularly scheduled to work more than forty (40) hours in any workweek unless overtime compensation is included in calculating final pay for the hours of work above forty (40).
  - 2.2.2. An exempt employee's work schedule is generally determined by the employee's responsibilities based on his/her workload or project necessity, subject to concurrence by the employee's department director.

### 3. Rest and Meal Periods

- 3.1. Rest and meal periods shall be provided in accordance with applicable law and scheduled by the employee's supervisor.
- 3.2. Meal periods are not provided on paid-time unless an on-duty meal period is provided or required as part of the employee's regular work schedule.

### 4. Overtime

- 4.1. In accordance with the Fair Labor Standards Act (FLSA), overtime pay is provided for "non-exempt" employees.
- 4.2. It is the responsibility of the Human Resources Director, subject to the approval of the General Manager, to designate each classification as FLSA "exempt" (not entitled to overtime) or FLSA "non-exempt" (entitled to overtime) in accordance with established FLSA criteria for "exempt" or "non-exempt" status.
  - 4.2.1.1. Employees in positions defined as FLSA "exempt" are not entitled to receive overtime pay.
  - 4.2.1.2. Employees in positions defined as FLSA "non-exempt" are entitled to overtime pay for hours worked in excess of forty (40) hours in the workweek.
    - 4.2.1.2.1. Eligible employees shall receive overtime compensation at the rate of one and one-half times their regular rate of pay for hours worked in excess of forty (40) hours in the workweek.
- 4.3. "Hours Worked"
  - 4.3.1. The use of any paid leave relating to vacation, paid holiday, paid military leave, and/or jury duty, will be counted as hours worked for overtime computation.
  - 4.3.2. The use of any paid leave relating to sick leave will NOT be counted as hours worked for overtime computation.
  - 4.3.3. All overtime hours worked by "non-exempt" employees must be approved in advance by the employee's supervisor.

- 4.3.3.1. Overtime hours worked without supervisory approval may be regarded as a violation of Intercity Transit policy and subject to disciplinary measures.
- 4.3.3.2. “Non-exempt” employees who work overtime will record such hours on their time sheet or time record rounded to the nearest quarter of the hour.
- 4.3.3.3. Supervisors are required to verify overtime prior to submitting payroll information to payroll.

**5. Conferences, Meetings and Travel**

- 5.1. Travel related to and attendance at Intercity Transit approved seminars, workshops, conferences, business-related meetings, and training programs may be considered hours worked for non-exempt employees. Compensation for travel and attendance at such activities shall be as provided by the Fair Labor Standards Act.

**6. Callback/Call-In**

- 6.1.1. All employees may be called back/called-in to work in situations as may be deemed appropriate.
- 6.1.2. A decision to call an employee back to work may be made by the supervisor or department director.

## 404 – Payroll Practices

### 1. Payroll Periods and Paydays

- 1.1. Intercity Transit's payroll periods shall be determined by the General Manager and shall be posted at the beginning of each calendar year.
  - 1.1.1. Intercity Transit reserves the right to change payroll periods when it is deemed in Intercity Transit's best interest to do so.
- 1.2. Paydays will be determined by the General Manager and will be posted at the beginning of each calendar year.
  - 1.2.1. Intercity Transit reserves the right to change paydays when it is deemed in Intercity Transit's best interest to do so.

### 2. Payroll Records

- 2.1. All employees are required to complete and sign payroll time sheets or records as provided.
  - 2.1.1. Supervisors are responsible to check the accuracy of, and sign, payroll records prior to submitting them to payroll staff for processing.
- 2.2. Payroll record corrections found after the records have been submitted for processing will be adjusted.
  - 2.2.1. If the hours not accounted for times the wage rate per hour is greater than \$100.00, a supplemental payroll check will be issued immediately.
    - 2.2.1.1. In the event a check is issued, the employee will receive 68% of the actual error.
    - 2.2.2. If the hours not accounted for times the wage rate per hour is \$100.00 or less, the adjustment will be deferred until the next regular payroll check is issued.
- 2.3. Falsification of payroll records is grounds for severe discipline, up to and including discharge.

### 3. Payment

- 3.1. Employees will be paid by check or through direct deposit to the employee's bank account.
  - 3.1.1. Payroll checks will normally be made available to employees at the employee's customary work location, or mailed to the employee's last known mailing address upon written request of the employee.
- 3.2. If, at any time, an employee wishes to authorize any other person to receive their paycheck, the employee must submit such a written authorization to the Human Resources Director or designee.
- 3.3. Employees hired after August 9, 2006, must receive their wages through direct deposit.
- 3.4. Irrespective of Section 3.3 above, final paychecks will only be issued using an Intercity Transit check.

### 4. Deductions

- 4.1.1. Deductions from each employee's gross pay period earnings are of two types: mandatory and voluntary.
- 4.1.2. Mandatory deductions are those required by law, court order, or other legally compelling influence on payroll. These may include, but are not limited to, state or federal tax withholding, social security related taxes, state retirement contributions, or wage attachments (e.g. wage levies and garnishments).
  - 4.1.2.1. Mandatory deductions will be made automatically by Intercity Transit.
  - 4.1.2.2. It is the responsibility of the employee to provide accurate and timely information for the calculation of mandatory deductions.
  - 4.1.2.3. Wage attachments or levies are made to employee paychecks, regardless of cause, and are regarded as mandatory deductions.

4.1.3. Voluntary deductions are those requested by employees. These may include items such as contributions for optional insurance coverage, retirement plans, credit union or savings accounts, or charitable donations.

4.1.3.1. Voluntary deductions must be authorized in writing by the employee.

## 405 – Benefits

### 1. Scope of Rule

- 1.1. Intercity Transit strives to provide valuable and cost effective benefits for employees as part of the employee's total compensation package.
- 1.2. The benefit package provided to non-represented employees is determined by the Intercity Transit Authority, based on recommendations made by the General Manager.
- 1.3. Benefits available to represented employees are determined by the expressed terms of the operative labor *Agreements*.
- 1.4. It is recognized that the total cost to provide the benefit programs described herein is a significant supplement to each employee's pay. Therefore, these benefits are properly considered as additional compensation, paid in various benefit forms by Intercity Transit, on behalf of each eligible employee.

### 2. Benefit Design

- 2.1. Intercity Transit reserves the right to design provisions and to add, eliminate, or in other ways modify any benefits described herein where and when as deemed appropriate by the General Manager and/or the Intercity Transit Authority.
- 2.2. Normally employees will be provided advance notice of any such modifications.

### 3. Employee Involvement in Cost-Sharing

- 3.1. Certain benefits are provided to full-time employees (equivalent to forty [40] hours work per week).
- 3.2. Where employees are classified to work a scheduled work week of less than full-time, some benefits provided by Intercity Transit may be provided on a prorated basis in reflection of the employee's full-time equivalent status. For example, a part-time employee normally scheduled to work twenty (20) hours per week would be considered to be in a 0.5 full-time equivalent status.
- 3.3. In instances where the full cost of a benefit plans exceeds Intercity Transit's contribution towards the full cost of the benefit, employees may be required to share in the cost by also contributing towards the full cost of the benefit. Employee contributions as referenced herein will normally be paid through payroll deduction.

### 4. Social Security and Medicare

- 4.1. Inasmuch Intercity Transit is not part of the Social Security System; Intercity Transit will match employee contributions to the herein provided deferred compensation programs (see Section 11 herein) at 6.2% of the employee's income from Intercity Transit for those employees who also contribute 6.2% or more of their income from Intercity Transit. The amount is higher for employees employed prior to April 1, 1986.
- 4.2. Intercity Transit shall contribute as required by law towards the cost of Medicare for all employees hired after March 31, 1986.
  - 4.2.1. Employees hired on or before March 31, 1986 who leave the employment of Intercity Transit and, thereafter, become re-employed by Intercity Transit shall be included in Medicare coverage as provided herein.

### 5. Worker's Compensation

- 5.1. Employees and Intercity Transit are covered under, and required to contribute to, the state's worker's compensation insurance program.

- 5.2. Worker's compensation provides certain medical benefits and/or time loss compensation to employees who incur an on-the-job injury or job-related illness.

## **6. Unemployment Insurance**

- 6.1. Employees may be eligible for unemployment benefits upon separation from Intercity Transit.
- 6.2. Unemployment benefits are provided by the Washington Employment Security Department in accordance with operative statutes, administrative rules and as may otherwise be determined by the Washington Employment Security Department.

## **7. State Retirement System**

- 7.1. Employees in eligible positions are covered under the State administered retirement program (Washington State Department of Retirement Systems).
- 7.2. Eligibility varies among the retirement plans established, and entitlements are subject to individual circumstances.
- 7.3. Both the employee's and Intercity Transit's contribution rates are established by law and the Washington State Department of Retirement Systems.

## **8. Employee Assistance Program**

- 8.1. An Employee Assistance Program (EAP) shall be made available to all regular employees
  - 8.1.1. The defined EAP shall be provided at no cost to employees:
- 8.2. EAP services shall be provided by a professional third party vendor.
- 8.3. Employees may voluntarily access EAP services.
  - 8.3.1. Voluntary EAP services shall be confidential.
- 8.4. By way of illustration and not by limitation, EAP services shall provide employees with counseling services on matters such as:
  - 8.4.1. challenges at work
  - 8.4.2. adaptation to change
  - 8.4.3. family or parenting issues
  - 8.4.4. substance abuse
  - 8.4.5. family relationships
  - 8.4.6. family care issues
  - 8.4.7. grief
  - 8.4.8. work/family/living balance
- 8.5. EAP services can be mandated
  - 8.5.1. In limited circumstances, employees can be mandated to access EAP services. By way of illustration and not by limitation, circumstances leading to an employee being mandated to access EAP services could include:
    - 8.5.1.1. excessive absenteeism or tardiness, including a pattern of absenteeism or tardiness
    - 8.5.1.2. expressions of anger or other threatening conduct
    - 8.5.1.3. chronic inattentiveness to task
    - 8.5.1.4. other circumstances having an adverse impact on the employee's ability to perform his or her regular duties.
  - 8.5.2. Time spent by an employee in a mandated EAP activity shall be paid time.
  - 8.5.3. An employee shall be mandated to access EAP services, including assessment, treatment and any post-treatment services by the employee's department director with the concurrence of the Human Resources Director.
  - 8.5.4. Intercity Transit reserves the prerogative to obtain reports on the employee's initial assessment, attendance and completion of a mandated EAP referral.

- 8.5.5. Employees mandated to access EAP services shall be directed to authorize Intercity Transit receive information regarding:
  - 8.5.5.1. the initial assessment;
  - 8.5.5.2. program or curriculum outline of any mandated services
  - 8.5.5.3. attendance reports at mandated services
- 8.5.6. Even when EAP services are mandated, Intercity Transit shall not have access to counseling notes, detailed descriptions of treatment or other details of a highly confidential or personal nature.
- 8.5.7. Employees who fail or decline to attend mandated EAP services may be subject to discipline up to and including discharge.

## **9. Eligible Dependents and Domestic Partners**

- 9.1. Eligible dependents for the purposes of this Rule shall be those as recognized by the US Internal Revenue Service.
- 9.2. Domestic partners for the purposes of this Rule shall be those as recognized by the Washington State Health Care Authority.
  - 9.2.1. To be recognized by the Washington State Health Care Authority, employees must submit a the Human Resources Department Washington State Health Care Authority Form HCA 50-704 with Sections 2 and 3 completed.

## **10. Health Care Insurance**

- 10.1. Intercity Transit makes available a health-care plan for eligible employees and their eligible dependents
- 10.2. Eligibility of employees is as determined by WAC 182-12-115.
  - 10.2.1.1. Employees classified who are regularly scheduled to work under twenty (20) hours per week are not eligible for health-care plan benefits.
- 10.3. Intercity Transit shall contribute an amount towards the cost of the premium for health care insurance as approved in the annual operating budget or other mechanism adopted by the Intercity Transit Authority.
  - 10.3.1. The premium cost balance, if any, is considered a mandatory payroll deduction for all participating employees.
- 10.4. For eligible employees, coverage begins on the first day of employment.
- 10.5. Types of coverage, dependent eligibility definitions, and benefit payment schedules are subject to change and described in Intercity Transit's health-care plan booklets available to eligible employees through Human Resources.
- 10.6. Health care coverage is available to an employee on an unpaid leave of absence provided the employee continues to pay for the coverage on a self-pay basis.
- 10.7. Upon separation from Intercity Transit employment or other qualifying event, an eligible employee and/or the employee's eligible dependents may elect to continue health benefits at their own expense to the extent provided for under the Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA).
- 10.8. An employee may elect to continue coverage under COBRA as follows:
  - 10.8.1. Upon separation (unless terminated for gross misconduct); or
- 10.9. An eligible dependent or domestic partner may elect to continue coverage under COBRA if:
  - 10.9.1. The employee's working hours are reduced, causing loss of coverage;
  - 10.9.2. Dependent status is lost because of age, change in marital status or termination of the spouse's or parent's employment;
  - 10.9.3. The spouse or parent who is an employee dies;
  - 10.9.4. The spouse or parent who is an employee becomes eligible for Medicare; or



- 10.9.5. The dependent is divorced or legally separated from an employee.
- 10.10. Employees must notify Human Resources when adding or removing dependents from health insurance coverage. Human Resources may require appropriate documentation for such requests, such as copies of birth certificates, adoption papers, marriage licenses or divorce decrees, to process changes.
- 10.10.1. Failure by an employee to notify Intercity Transit of a change in the status of eligible dependents within thirty (30) days of the event(s) may subject the employee to discipline up to and including discharge.

## **11. Benefits Eligibility Appeal Process**

- 11.1. An eligibility or enrollment decision made by Intercity Transit may be appealed by submitting a written request for review to Finance Director. Intercity Transit must receive the request for review within thirty days of the date of the initial denial notice. The contents of the request for review must contain all of the following:
- 11.1.1. The name and mailing address of the appealing party;
  - 11.1.2. The name and mailing address of the appealing party's representative, if any;
  - 11.1.3. Documentation, or reference to documentation, of decisions previously rendered through the appeal process, if any;
  - 11.1.4. A statement identifying the specific portion of the decision being appealed and clarifying what is believed to be unlawful or in error;
  - 11.1.5. A statement of facts in support of the appealing party's position;
  - 11.1.6. Any information or documentation that the appealing party would like considered and substantiates why the decision should be reversed. Information or documentation submitted at a later date, unless specifically requested by the Finance Director, may not be considered in the appeal decision;
  - 11.1.7. The type of relief sought;
  - 11.1.8. A statement that the appealing party has read the notice of appeal and believes the contents to be true;
  - 11.1.9. The appellant may chose to use the form provided by PEBB to submit this information. The form is available on line at: <http://www.pebb.hca.wa.gov/documents/forms/2011/50-122.pdf>.
- 11.2. Upon receiving the request for review, Intercity Transit shall make a complete review of the initial denial by one or more staff who did not take part in the initial denial. As part of the review, the Finance Director may hold a formal meeting or hearing, but is not required to do so.
- 11.3. The Finance Director shall render a written decision within thirty days of receiving the request for review. The written decision shall be sent to the appellant.
- 11.4. A copy of Finance Director's written decision shall be sent to the General Manager or designee and to the PEBB appeals manager. The Finance Director's written decision shall become Intercity Transit's final decision effective fifteen days after the date it is rendered.
- 11.5. Intercity Transit may reverse eligibility or enrollment decisions based only on circumstances that arose due to delays or errors caused by Intercity Transit.
- 11.6. Any employee or employee's dependent who disagrees with Intercity Transit's decision in response to a request for review, as described herein, may appeal that decision by submitting a notice of appeal to the PEBB appeals committee. The PEBB appeals manager must receive the notice of appeal within thirty days of the date of the employing state agency's written decision on the request for review.
- 11.6.1. The contents of the notice of appeal are to be provided in accordance with WAC 182-16-040.

## **12. Deferred Compensation Programs**

- 12.1. Employees may participate in Intercity Transit sponsored salary reduction plan (e.g. 401k Plan and Trust).and/or deferred compensation plan (e.g. ICMA 457 Plan) at their option. Eligibility determination and required contribution amounts vary among the plans established, and entitlements are subject to individual circumstance.
- 12.2. Inasmuch Intercity Transit is not part of the Social Security System (see Section 4 herein) Intercity Transit will match employee contributions for employees hired after March 31, 1986 to the herein deferred compensation programs as provided in HRR 405.4.1 herein.
- 12.3. Intercity Transit will match employee contributions for employees hired on or before March 31, 1986 and who have remained continuously employed to the herein provided deferred compensation programs up to 7.65% of the employee's income from Intercity Transit.
  - 12.3.1. Employees hired on before March 31, 1986 who leave the employment of Intercity Transit and, thereafter, become re-employed by Intercity Transit shall be eligible for a match of employee contributions of up to 6.2% of the employee's income from Intercity transit.

## **13. Transportation Passes**

- 13.1. Intercity Transit provides transportation pass to each employee and the employee's spouse or domestic partner and dependents as defined in HRR 405.9 herein.
- 13.2. An employee retiring from Intercity Transit service as defined under the state sponsored retirement program (see Section 7 herein) and the employee's spouse or domestic partner shall be entitled to receive transportation passes for their use during the employee's retirement years.
  - 13.2.1. An employee who has served a minimum of 25 years at Intercity Transit and is unable to continue employment at Intercity Transit owing to an illness or injury, will be considered "retired" for the purpose of being eligible for a retiree bus pass.
  - 13.2.2. A "retired employee" may obtain the pass on or after their separation of employment with Intercity Transit.
- 13.3. Temporary hire employees, including those hired from an outside agency are eligible for a transportation pass. A temporary employee's spouse, domestic partner and dependents are not eligible. Upon the end of the temporary employee's assignment, the pass will be returned to Intercity Transit.

## **14. Parking**

- 14.1. Intercity Transit provides and maintains limited parking facilities for the use of employees. As space is limited, employees are encouraged to use transit buses, vans, carpools, vanpools, bicycles, walking to work or other alternative transportation whenever possible.
- 14.2. Employees electing to drive their personal vehicles to work are to park only in designated areas.
- 14.3. Intercity Transit assumes no responsibility for damage to vehicles or theft of articles from vehicles while on Intercity Transit property.
- 14.4. Employees shall observe the 10 m.p.h. speed limit on Intercity Transit property at all times.
- 14.5. Intercity Transit reserves the right to impose or charge parking fees for the use of Intercity Transit provided parking facilities.

## **501 – Employee Responsibilities, Performance and Conduct\**

### **1. Employee Information**

- 1.1. Each employee has an assertive duty to advise his/her department director and the Human Resources Director of the employee's contact information, including, but not necessarily limited to:
  - 1.1.1. current residential address
  - 1.1.2. current personal telephone number
  - 1.1.3. any change in legal name
  - 1.1.4. any change in the employee's social security number
- 1.2. Each employee has an assertive duty to update the information referenced in Section 1.1 herein in a timely manner.

### **2. Professional Performance and Conduct**

- 2.1. Every employee will constantly strive to attain the highest professional standard of performance and conduct. Employees shall perform their duties in a professional manner and govern themselves by reasonable rules of good conduct and behavior, and shall not commit any act tending to bring discredit upon Intercity Transit.
- 2.2. Employees shall, on all occasions in the performance of their duties or when they can be identified as an Intercity Transit employee, be respectful, courteous and considerate toward all other employees and the public.

### **3. Appearance**

- 3.1. The success of Intercity Transit is determined in part by establishing and maintaining a proper business atmosphere, which is determined by the image employees project as well as business conduct. Employees shall dress in a manner consistent with the nature of work performed.
  - 3.1.1. If there are questions as to what constitutes proper attire, employees should consult with their supervisor.
- 3.2. Employees who are inappropriately dressed, in the opinion of their supervisor, will be sent home and required to return to work in acceptable attire. Under such circumstances, employees will not be paid for the time away from work.
- 3.3. Uniforms supplied by Intercity Transit will be kept in neat, clean, and properly maintained condition. Such uniform apparel may not be used as personal attire outside the work location. Uniforms whose condition no longer meets Intercity Transit standards of appearance should be turned in for replacement.
  - 3.3.1. Upon separation or termination from Intercity Transit service, employees will be required to return all Intercity Transit supplied uniform apparel in a clean and neat condition.

### **4. Contact with the Media**

- 4.1. Only the General Manager, representatives designated by the General Manager, and department directors are authorized to speak in an official capacity on behalf of Intercity Transit on policy matters. Whenever possible, employees should refrain from discussing matters involving Intercity Transit policy or litigation matters with the news media.
- 4.2. All questions concerning incidents or potential, pending or actual litigation should be referred to a department director or the General Manager.

## **5. Testimony in Formal Hearings**

- 5.1. An employee who is asked to or required to testify in person or by deposition in any trial or hearing to which Intercity Transit is a party should notify his/her department director or the Human Resources Director of his/her involvement in the matter. However, if an employee is a party to such trial or hearing, notification of Intercity Transit is governed by the Civil Rules or other applicable rules of procedure.

## **6. Outside Employment/Solicitation**

- 6.1. Employees shall not work for another employer, including themselves, while on duty.
- 6.2. Except as approved by the involved supervisor, no employee shall conduct a person to person solicitation of funds or contributions from other employees or customers while at Intercity Transit facilities or on Intercity Transit vehicles.
- 6.3. Employees may engage in off-duty employment, provided that:
  - 6.3.1. The employment does not conflict with Intercity Transit's Procurement Policy.
  - 6.3.2. The employment does not conflict with the employee's work schedule, duties, or responsibilities.
  - 6.3.3. The employment does not involve conducting off-duty employment related business during hours of employment with Intercity Transit.
  - 6.3.4. The employee does not use Intercity Transit property or vehicles when engaging in off-duty employment.
- 6.4. Self-employment is considered off-duty employment and falls under the same conditions as other off-duty employment, with the addition of the restriction that the self-employment does not involve ownership of a private business that is incompatible with an employee's Intercity Transit position.
  - 6.4.1. An employee who sustains an injury or illness in connection with off-duty employment is not entitled to receive worker's compensation benefits provided by Intercity Transit.
  - 6.4.2. In cases where an off-duty employment related injury or illness results in an employee's temporary disability, the employee shall be required to use any available sick leave and vacation leave hours during the period of disability. Upon exhaustion of paid leave hours, the employee may request a leave of absence without pay as may be provided in accordance with the Human Resources Rules.

## **7. Off-Duty Activities**

- 7.1. Certain types of off-duty activities by employees represent the potential of a material business concern to Intercity Transit. Employees who engage in, or are associated with illegal, harmful or destructive conduct, the nature of which adversely affects Intercity Transit, or their own ability or credibility to carry out their employment responsibilities, may be subject to disciplinary action up to and including termination.

## **8. Economic Exchanges Between Employees**

- 8.1. Intercity Transit does not condone, nor assume any liability for, the practice of lending or borrowing money, or anything of monetary or personal value, between employees. Employees who voluntarily participate in such activity, or create these obligations, do so at their own risk.

## **9. Visits**

- 9.1. Visitors may be disruptive to the safe and efficient operations of Intercity Transit. Further, Intercity Transit has an insurance liability for persons visiting Intercity Transit business locations.

- 9.2. Friends or relatives of an employee shall not normally visit the employee during the employee's working hours. Additionally, employees should refrain from "visiting" with co-workers on personal, non-business related matters during the employee's or co-worker's regular working hours.
- 9.3. Employees are expected to exercise good judgment in their handling of unforeseen visits and using company time for personal business reasons.
- 9.4. Upon the prior approval by an employee's supervisor, exceptions may be made for unique or urgent circumstances.

## **502 – Performance Evaluations**

### **1. Employee Performance May be Monitored**

- 1.1. The Human Resources Director is responsible to coordinate and oversee the employees' performance evaluation system.
- 1.2. It is the responsibility of supervisors and management personnel to review the work of subordinate employees; to make efforts to assist employees in correcting deficiencies; and to evaluate employees objectively for their performance during the evaluation period.
- 1.3. Employee performance evaluation is one means by which inadequate performance may be identified.
  - 1.3.1. While the performance evaluation process and performance evaluation reports could be operative in supporting separate disciplinary action, the process and reports do not, of themselves, constitute discipline.

### **2. Review of Performance Evaluation With the Employee**

- 2.1. Before any performance evaluation material is inserted into the employee's personnel file, the material will be discussed with the applicable employee.
- 2.2. The employee will be given a copy of any performance evaluation report or similar material that is completed.
- 2.3. Employees may insert comments regarding any evaluation report into their personnel file.
- 2.4. The employee is required to sign the performance report to acknowledge the employee's awareness of its content and opportunity to discuss the evaluation with the rating supervisor.
  - 2.4.1. The employee's signature does not necessarily mean that the employee fully agrees with the contents of the report, and the employee may so state on the form before signing.

### **3. Effect of Less Than Satisfactory Performance Evaluation**

- 3.1. An employee receiving a less than satisfactory performance evaluation may have his/her employment conditions modified in the following manner.
  - 3.1.1. Ineligibility for promotional consideration until the deficiency is corrected.
  - 3.1.2. Transfer to a comparable position or demotion of an indefinite duration.
  - 3.1.3. Subject to disciplinary action, up to and including termination of employment.
- 3.2. Specific action that may occur as a result of a less than satisfactory performance evaluation will depend on, but not be limited to:
  - 3.2.1. the weight or significance of the evaluation category compared to the importance of other aspects of job performance.
  - 3.2.2. the length of time pertinent job factors have been observed by the rating supervisor.
  - 3.2.3. Other factors as may be appropriate.

## 503 – Ethics

### 1. Purpose and Scope

- 1.1. No employee of Intercity Transit shall use his/her position for personal gain. Further, employees shall avoid conflicts of interest, potential conflicts of interest or appearance of conflicts of interest that may interfere with proper management of Intercity Transit. Employees of Intercity Transit shall not use their position to generate opportunities for private advancement or gain or for avoidance of private detriment or loss.
- 1.2. This Rule is applicable to all employees of Intercity Transit. In addition, employees are subject to any applicable policies, state laws dealing with conflicts of interest and other elements of ethical conduct, including Article 9 of the Intercity Transit Procurement Policy. Employees who are also municipal officers are, in addition, subject to the requirements of Chapter 42.20 and 42.23 RCW and any other law governing municipal officers. This Rule shall not be inconsistent with the applicable policies or with state laws such as described in RCW 42.23. However, the standards set out in this Rule may create a higher standard of conduct than created by state law.
- 1.3. This Rule shall further act as a guide for employees of Intercity Transit to properly administer the function of Intercity Transit in a manner that best illustrates independent, impartial and responsible management of Intercity Transit. This Ethics Rule is intended to provide a guide for Intercity Transit employees in avoiding situations of conduct which may give rise to an appearance of impropriety even though there is no factual or implied impropriety. This Rule shall provide protection for Intercity Transit, its employees and the citizens being served against public decisions which may be affected by undue influence, conflicts of interest, or any other violation of this Rule.

### 2. Definitions

- 2.1. The term "employee," as used in this Rule, means a person or persons employed on a full-time or part-time basis; however, an employee does not include a person or persons contracting with Intercity Transit to perform consulting or special technical services.
- 2.2. The term "financial interest" as used in this Rule means:
  - 2.2.1. ownership of any interest or involvement in any relationship from which, or as a result of which, a person within the past year has received, or is presently or in the future entitled to receive, more than \$1,000 per year, or its equivalent, except that remote interests are not included where the person holds less than one percent of the shares of a corporation or cooperative which is a contracting party, or the person has holdings in mutual funds or similar investment pooling funds in which the person has no management powers; however, municipal officers are subject to the more restrictive scope of remote interest in RCW 42.23.040.
  - 2.2.2. ownership of 1% of any property or business; or
  - 2.2.3. holding a position in a business such as an officer, director, trustee, partner, employee, or the like, or holding any position of management.
- 2.3. The term "immediate family", as used in this Rule, includes a spouse, children, parents, brothers, sisters, one to whom one is engaged to be married, and a domestic partner.
  - 2.3.1. Domestic partners are two people, 18 years of age or older who share the same regular and permanent residence and neither of whom is married or related by blood in a manner that would bar their marriage in the State of Washington. It is intended that domestic partners be people who have a relationship of mutual support, caring, and commitment, and are each other's sole domestic partner.
- 2.4. Blind Trust as used in this Rule means an independently managed trust in which the employee-beneficiary has no management rights and in which the employee-beneficiary is

not given notice of alterations in, or other dispositions of, the property subject to the trust.

**3. Conflicts of Interest – Ethics in Public Contracting**

3.1. Employees of Intercity Transit shall be subject to the protocols and requirements established in the Intercity Transit Procurement Policy and Procedures (as amended) and state law. The Intercity Transit Procurement Policy contains requirements dealing with conflicts of interest and other matters of ethical conduct in procurement and contracting.

**4. Duty to Report**

4.2. All employees are directed to disclose fraud, abuse, and corruption by any other employee or official of Intercity Transit. Employees who are unsure whether to report an action shall bring the issue to the attention of their supervisor or to the General Manager. Any employee reporting alleged improper action as identified in RCW 42.41.020 is subject to the protections of Chapter 42.41 RCW and Intercity Transit Human Resources Rule 603. Any employee who has, or obtains any benefit from, any Intercity Transit contract with a business in which the employee has a financial interest shall report such benefit to the General Manager; provided, however, this Section shall not apply to a contract with a business where the employee's interest in the business has been placed in a disclosed blind trust.

4.2.1. "Benefit" as used in this provision is defined in the same manner as in Section 9-101 of the Intercity Transit Procurement Policy and is present when an employee has a financial interest in a business awarded contract by Intercity Transit and the contract exceeds \$25,000.

4.3. Any employee who knows or should have known of such benefit, and fails to report such benefit to the General Manager, is in breach of this Rule.



## **504 - Use of Equipment, Vehicles and Information/Communication Resources**

### **1. Use of Equipment or Vehicles**

- 1.1. Employees are expected to use Intercity Transit equipment for the primary purpose of performing their job duties. Intercity Transit equipment includes, but is not limited to: vehicles, phones, fax machines, computers, cameras, copiers, keys, shop tools, pagers, equipment, facilities and miscellaneous office supplies.
- 1.2. Employees who are issued keys and/or combinations have the responsibility to insure the integrity of the Organization's key and lock system. This system includes, but is not limited to: buildings, vehicles, safes, vaults, keys, access cards, and combinations.
  - 1.2.1. In order to maintain the safety and security of all Intercity Transit vehicles, buildings and equipment, any lost keys or access cards must be reported immediately to the Department Director.
- 1.3. Upon separation, employees are to return all company equipment and materials no later than their last working day.
- 1.4. Intercity Transit vehicles are not to be used for private purposes or other business purposes not related to the business affairs of Intercity Transit.
- 1.5. Subject to any exceptions established by law, no Intercity Transit facilities at any time, or employee time during working hours, may be used, directly or indirectly, for the purpose of assisting a campaign for election to any office or for the promotion of or opposition to any ballot proposition.

### **2. Employee Use of Information Technologies or Communication**

- 2.1. Employees' use must not compromise the integrity of the Intercity Transit's computer systems, data, networks and communications systems. Employees' use of information systems or communication devices must comply with all service and contractual agreements with commercial Internet service providers, intellectual property rights, copyright, software license agreements and agreement with communications equipment vendors.
- 2.2. Employees will acknowledge receipt of this Rule and confirm they have read the Rule.
- 2.3. All computer applications, programs, and information created or stored by employees on agency owned information systems are Intercity Transit property.
- 2.4. Intercity Transit expressly reserves the right to monitor and review all internet and email traffic conveyed through its system or via an Intercity Transit computer. **Employees shall have no expectation of personal privacy in the use of Intercity Transit's information systems or communication devices.**
  - 2.4.1. All email messages sent or received through the Intercity Transit system or via an Intercity Transit computer and the record of all websites accessed through the Intercity Transit system or via an Intercity Transit computer are subject to public disclosure.
- 2.5. Intercity Transit's information systems are intended for professional business use in performing the duties of an employee's job. Limited personal use may be permitted according to the following guidelines;
  - 2.5.1. It is incidental, occasional and of short duration;
  - 2.5.2. It is done on the employee's personal time. Personal time means during breaks, lunch and/or before and after work as defined by collective bargaining agreements, and the Human Resource rules.
  - 2.5.3. It does not interfere with any employee's job activities. This includes activities which might pose a conflict of interest or appearance of impropriety with an individual's employment with the Intercity Transit;
  - 2.5.4. It does not bring discredit to Intercity Transit;
- 2.6. It does not violate any law.

- 2.7. Employees shall not use Internet Relay Chat (IRC) channels or other Internet forums, such as newsgroups or net servers, and/or “chat rooms” except for work related business only.
- 2.8. Employees shall not express personal or political opinions via Intercity Transit equipment or Intercity Transit Internet access lines/email systems, except when any such opinions are related to a business purpose.
- 2.9. Employees shall not use Intercity Transit wireless communications cards on non-Intercity Transit computers without the prior approval of their department director.
  - 2.9.1. Any communications or data transmitted through an Intercity Transit wireless card is subject to public disclosure as provided in Section 504.2.4.1.

### **3. Acquisition of Information/Communications Resources**

- 3.1. All information systems or communication devices to be used by Intercity Transit shall be acquired as directed by the General Manager or the delegated department director. By way of illustration and not by limitation this includes:
  - 3.1.1. computers
  - 3.1.2. computer peripherals
  - 3.1.3. cameras
  - 3.1.4. audio devices
  - 3.1.5. telephones
- 3.2. Employees are not permitted to connect any information systems or communications devices to any information or communications network operated by Intercity Transit.

### **4. Prohibited Use of Information/Communications Resources**

- 4.1. The following list of prohibited uses for information technologies is not intended to be all-inclusive.
  - 4.1.1. To cause a breach of security or any action to attempt to circumvent or reduce the security of Intercity Transit’s computer, network and communications resources or of any confidential information entrusted to the custody of Intercity Transit.
  - 4.1.2. Misuse of service or any action that renders the user’s computer, network or communications equipment unusable, or that interferes with another employee’s use of such resources.
  - 4.1.3. Illegal use or use of Intercity Transit’s information or communications resources in the commission of an illegal act.
  - 4.1.4. Altering information or communications resources to hide one’s identity or to impersonate another individual. All e-mails, news posts or any other form of electronic communication must contain the sender’s real name and/or e-mail address.
  - 4.1.5. Employees may not use Intercity Transit’s information resources to avoid the expense of personally purchasing comparable hardware, software, and/or internet access.
  - 4.1.6. Employees may not solicit email communications for purposes unrelated to the conduct of Intercity Transit business.
  - 4.1.7. Employees may not use the Intercity Transit system or any Intercity Transit computer to access websites, “chat rooms”, or domains containing inappropriate content, including, but not necessarily limited to:
    - 4.1.7.1. discriminatory content
    - 4.1.7.2. hate messaging or content
    - 4.1.7.3. containing offensive material such as sexually suggestive text or images, pornography or violence.
    - 4.1.7.4. Gambling
    - 4.1.7.5. on-line gaming
    - 4.1.7.6. partisan political content

- 4.1.8. Employees may not remove Intercity Transit owned information and communications equipment from Intercity Transit premises or vehicles, modify Intercity owned vehicles or equipment, or alter Intercity Transit owned software without appropriate authorization.
- 4.1.9. Employees may not download or install any software or click yes on upgrade boxes. All requests for software or upgrades must be approved by Intercity Transit's IS division. Unlicensed or copied software is prohibited on any Intercity Transit computer.
  - 4.1.9.1. This does not apply to documents, PDF and other document files.
- 4.1.10. Employees may not connect peripheral devices to Intercity Transit computers or other information and communications equipment without prior approval from the employee's department director. "Peripheral devices" includes, but is not necessarily limited to:
  - 4.1.10.1. audio or video recorders or players
  - 4.1.10.2. "internet phones"
  - 4.1.10.3. game devices
  - 4.1.10.4. Employees may not copy computer software licensed to Intercity Transit.

**5. Violations of any part of this Rule shall be cause for discipline.**

## 505 – Attendance

### 1. Regular Attendance and Timeliness Required

- 1.1. Except as may be protected by applicable law, employees shall maintain a pattern of regular and reliable attendance.
- 1.2. Employees shall report to duty in accordance with the rules regarding hours of work, holidays and leaves of absence.
- 1.3. Except as may be protected by applicable law, employees shall report ready for work in a timely manner and shall normally remain on duty until the end of their shift or completion of their scheduled work day.

### 2. Notification to Supervisor Required

- 2.1. No employee shall be late in reporting to or be absent from work for any reason other than those specified in these rules and regulations without making prior arrangements with his/her supervisor. Unless such arrangements are made, an employee who, for any reason, fails to report to work or fails to report to work in a timely manner, shall immediately notify his/her supervisor of the reason for the absence or tardiness.
  - 2.1.1. The employee has an assertive duty to contact the employee's supervisor.  
Communicating with other representatives of Intercity Transit does not relieve the employee of his/her obligation to contact his/her immediate supervisor.
- 2.2. If an absence continues beyond the first day, the employee shall notify the employee's supervisor on a daily basis unless other arrangements have been made with the supervisor. If absence continues over three (3) consecutive days, a medical certificate may be required by Intercity Transit.
- 2.3. An unauthorized absence from duty shall be considered an absence without leave approval.
  - 2.3.1. An absence without leave approval shall normally be without pay and may be cause for discipline.

### 3. Abandonment of Position

- 3.1. After three consecutive scheduled work days of unauthorized absence and/or the employee's failure to contact the employee's supervisor as provided herein, the employee shall be considered to have abandoned the employee's position.
- 3.2. Abandonment of position shall be considered a constructive resignation from employment from Intercity Transit and the employment relationship shall be considered null and void.

## 506 – Political Activity

### 1. Political Activity

- 1.1. The provisions of RCW 41.06.250 as amended are incorporated herein and are made applicable to Intercity Transit employees.
- 1.2. Intercity Transit employees may participate in political or partisan activities of their choosing provided that:
  - 1.2.1. Intercity Transit resources and property are not utilized;
  - 1.2.2. The activity does not adversely affect the responsibilities of the employees in their positions:
- 1.3. Employees may not campaign on company time, in an Intercity Transit vehicle, in any part of an Intercity Transit uniform, or while representing Intercity Transit in any way.
- 1.4. Employees may not allow others to use Intercity Transit facilities or funds for political activities.
- 1.5. Any Intercity Transit employee who meets with or may be observed by the public or otherwise represents Intercity Transit to the public, while performing his/her regular duties may not wear or display any button, badge or sticker relevant to any candidate or ballot issue during working hours. Employees shall not solicit on Intercity Transit property, in an Intercity Transit vehicle or on Intercity Transit time for a contribution for a partisan political cause.
- 1.6. Subject to any exceptions established by law, no Intercity Transit facilities at any time, or employee time during working hours, may be used, directly or indirectly, for the purpose of assisting a campaign for election to any office or for the promotion of or opposition to any ballot proposition.

## **507 – Conviction of Certain Crimes – Affect on Continued Employment**

### **1. Conviction of Certain Crimes, Court and Administrative Orders – Affect on Continued Employment**

- 1.1. Convictions of certain crimes may have a direct effect on an employee's ability to perform his/her regularly assigned duties.
- 1.2. The degree to which the conviction of a crime has on an employee's ability to perform his/her regular duties would include, but is not necessarily limited to:
  - 1.2.1. the nexus between the type of crime and the employee's regular duties;
  - 1.2.2. the impact any post-conviction judicial or administrative orders, limitations placed on the employee or sentence may have on the employee's ability to perform his/her regular duties.
- 1.3. A determination on the employee's ability to continue to perform his/her regular duties shall be made by the Human Resources Director in consultation with the employee's department director.
- 1.4. Employees who are no longer able to perform their regular duties as provided herein shall be subject to dismissal.

### **2. Duty to Report**

- 2.1. All employees have a duty to report to Intercity Transit in the event they have been convicted of any misdemeanor including fraud, abuse, abuse of a minor, unlawful sexual misconduct, battery and any conviction of a felony.
  - 2.1.1. The employee shall report as required herein within fourteen (14) calendar days of the conviction.
- 2.2. An employee may report as required herein to his/her supervisor, department director or the Human Resources Director.
- 2.3. Any employee who fails to report as required herein shall be subject to discipline, up to and including discharge.

## **509 – Harassment Prohibited**

### **1. Workplace Harassment Prohibited**

- 1.1. Intercity Transit is committed to a work environment that is free of illegal bias, prejudice and harassment and where all individuals are treated with respect and dignity. Every individual has the right to work in a professional atmosphere that promotes employment opportunities and prohibits discriminatory practices.
- 1.2. By this Rule, Intercity Transit prohibits workplace harassment and discrimination on the basis of race, color, religion, gender, marital status, familial status, national origin, age, mental or physical disability, sexual orientation, gender identity, genetic information or veteran status.
- 1.3. Harassment and discrimination is prohibited in the workplace or in any work-related setting outside the workplace. Every employee shares the assertive responsibility for bringing to Intercity Transit's attention conduct that interferes with providing a work environment free of illegal discrimination and harassment.
  - 1.3.1. An employee may submit a report of concern as required herein as provided in Section 7.2 herein.
- 1.4. Intercity Transit is an equal employment opportunity employer. Intercity Transit will continue to recruit, hire, train, and promote into all job levels without regard race, color, religion, gender, marital status, familial status, national origin, age, mental or physical disability, sexual orientation, gender identity, or veteran status.
- 1.5. . Intercity Transit will continue to administer all other personnel matters in accordance with this rule.
  - 1.5.1. Physical capacity requirements relating to minimum standards for employment may be a reasonable selection factor. However, such standards must be reasonably necessary for the specific work to be performed and uniformly applied to all applicants for the particular job category, regardless of age or sex.
  - 1.5.2. Age, gender or physical requirements may be considered if they constitute a bona fide occupational qualification necessary for performance of the essential duties of the job.
  - 1.5.3. See also HRR 301 and HRR 302.
- 1.6. Officials and all employees of Intercity Transit, management and supervisory staff in particular, shall ensure that the intent and the stated requirements of this rule are implemented in all employee relations and personnel practices. It is the responsibility of every employee to ensure that the work environment is free of any practice of discrimination or harassment.
- 1.7. The Human Resources Director and General Manager are responsible for implementation of the affirmative action program.

### **2. Scope of Rule Prohibiting Harassment**

- 2.1. This Rule covers all employees and applicants for employment with Intercity Transit, as well as transit customers and contractors providing services to Intercity Transit such as outside vendors or consultants. Notification of this rule will be posted in areas normally accessible to transit customers. Contractors providing a service to Intercity Transit will be notified of this Rule.
- 2.2. Workplace harassment manifests itself in two primary ways:
  - 2.2.1. In forms of harassment that violate state and federal laws; and
  - 2.2.2. In forms of harassment that may not violate law, but which violate this Rule because they are not conducive to creating a work environment for employees that is consistent with the intent of this Rule.

2.3. This Rule covers both types of harassing behavior. Employees are expected to talk with their supervisor, managers, department directors, other supervisors, managers or directors and or Human Resources about harassment they experience regardless of its origin. Supervisors, managers or directors receiving such complaints are expected to take appropriate corrective action to stop the harassment.

### **3. Definitions**

3.1. Harassment: verbal, physical or other conduct that is derogatory or shows hostility towards an individual because of his or her race, color, religion, gender, marital status, familial status, national origin, age, mental or physical disability, the use of a trained dog guide or service animal, sexual orientation, gender identity, genetic information or veteran status.

3.2. ,and

3.2.1. has the purpose or effect of creating an intimidating, hostile, abusive, or offensive work environment; or

3.2.2. has the purpose or effect of unreasonably interfering with an individual's work performance; or

3.2.3. otherwise adversely affects an individual's employment and employment-related opportunities.

3.3. Sexual Harassment: unwanted sexual advances, requests for sexual favors, and other sexually oriented verbal or physical conduct constitutes sexual harassment under this rule where:

3.3.1. submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment; or

3.3.2. submission to or rejection of such conduct is used as a basis for employment decisions affecting such individual; or

3.3.3. such conduct has the purpose or effect of unreasonably interfering with an individual's work performance, or creating an intimidating, hostile, or offensive work environment.

### **4. Examples of Prohibited Conduct**

4.1. Verbal or Physical Conduct

4.1.1. Use of insults innuendos or slurs because of an individual's race, color, religion, gender, marital status, familial status, national origin, age, mental or physical disability, sexual orientation, gender identity, or veteran status.

4.1.2. Jokes, pranks or other banter, including negative stereotyping, which relates to or is derogatory or shows hostility based on an individual's race, color, religion, gender, marital status, familial status, national origin, age, mental or physical disability, sexual orientation, gender identity, or veteran status.

4.1.3. Unwelcome physical touching or contact, such as pinching, kissing, grabbing, patting or hugging.

4.2. Written or Graphic Material

4.2.1. Material that is disparaging or displays hostility on the basis of a race, color, religion, gender, marital status, familial status, national origin, age, mental or physical disability, sexual orientation, gender identity, or veteran status and is placed on walls or elsewhere in the employer's premises or circulated in the workplace.

4.2.2. Material that reasonably deemed to be sexually provocative or stimulating and is placed on walls or elsewhere in the employer's premises or circulated in the workplace.

4.2.3. The provisions of above in Subsections 4.2.1 and 4.2.2 include but are not limited to sending inappropriate jokes or other written or graphic materials via email, the internet or by fax, or downloading this material from the internet.



## **5. Retaliation Prohibited**

5.1. Intercity Transit will not tolerate retaliation against any individual who reports discrimination or harassment, testifies, assists, or participates in any manner in an investigation, proceeding or hearing, regardless of the outcome of the complaint. Examples of retaliation towards an individual include demotion, suspension, failing to hire or consider hiring, failing to treat impartially when making employment related decisions, assigning the individual the least desirable jobs. It may also include more subtle forms such as shunning by co-workers.

## **6. Responsibilities of Directors, Managers and Supervisors**

- 6.1. Directors, managers and supervisors are expected to enforce this rule and maintain a productive, non-hostile work environment. Directors, managers and supervisors must take immediate action to stop and prevent discrimination or harassment, where they know or have reason to know that it is occurring. Tacit approval of discrimination and/or harassment by, for example, laughing and treating a situation as a joke, failing to take action or advising an employee not to complain is prohibited.
- 6.2. Directors, managers and supervisors are responsible for ensuring that notes, comments, posters and other materials on walls, bulletin boards or elsewhere in the workplace, that are derogatory or show hostility toward an individual or group because of race, color, religion, gender, marital status, familial status, national origin, age, mental or physical disability, sexual orientation, gender identity, or veteran status are removed.
- 6.3. Directors, managers and supervisors are expected to educate employees about the impropriety of these items as well as the inappropriateness of jokes, slurs, or other negative verbal comments that violate this rule. Directors, managers and supervisors are also responsible for educating employees that the use of equipment owned by Intercity Transit, including vehicles and electronic devices such as computers, telephones, photocopiers, or faxes for any of these purposes is also prohibited.
- 6.4. If a director, manager or supervisor receives a complaint from an employee, an applicant, a member of the public or a contractor about discrimination, harassment or retaliation on an Intercity Transit facility or in an Intercity Transit vehicle, they should immediately contact the Human Resources Director or designee.
- 6.5. Directors, managers and supervisors are expected to contact Human Resources even if the person making the complaint requested that it be kept confidential. Directors, managers and supervisors should inform an individual making a complaint that strict confidentiality may not be feasible.
- 6.6. Any supervisor or manager who is aware of harassment or discrimination and condones it by action or inaction will be subject to disciplinary action.

## **7. Internal Complaint Process**

- 7.1. Any individual who feels he/she has been the victim of prohibited discrimination or harassment has an assertive duty to notify the responsible person(s) of the inappropriateness of their conduct or to report the inappropriate conduct to a person identified in Subsection 7.2 below.
- 7.2. Who to Contact
  - 7.2.1. A current employee of Intercity Transit may also discuss such concerns with his/her immediate supervisor. This will provide the supervisor with an opportunity to review the concerns of the individual. If the employee does not feel comfortable discussing the concerns with his/her immediate supervisor, the employee should contact:
    - 7.2.1.1. their supervisor's manager; or their department director; or
    - 7.2.1.2. Human Resources

- 7.3. A non-Intercity Transit employee such as an applicant, a member of the public or a contractor may contact the specific department where the alleged discrimination or harassment occurred or file a complaint with Human Resources.
- 7.4. Review of a Complaint
  - 7.4.1. All complaints must be thoroughly and promptly investigated.
  - 7.4.2. The Human Resources Director shall be responsible for conducting the investigation and submitting a report and recommended action to the General Manager.
  - 7.4.3. The individual making the complaint and the accused shall be notified of the results of the investigation and whether action will be taken.
  - 7.4.4. In the event the person making the complaint is not satisfied with the report or results of the investigation, the person making the complaint may request the issue be addressed by the General Manager.
  - 7.4.5. The General Manager shall review the report and action to be taken and shall issue a determination in response to the person making the complaint. The General Manager may affirm the report and action or may make amendments to the report or the action to be taken.
  - 7.4.6. The General Manager's review and determination is the final administrative review of the matter.

## **510 – Workplace Violence Prohibited**

### **1. Workplace Violence is Prohibited**

1.1. Intercity Transit will not tolerate workplace violence in any form. Intercity Transit promotes a work environment in which employees can perform their jobs with a reasonable expectation of safety and security. Any behavior that undermines the safety and security of the work environment is prohibited.

### **2. Scope of Rule**

- 2.1. This Rule applies to all Intercity Transit employees, customers, contractors, vendors, and visitors to Intercity Transit headquarters, shops, facilities or offices.
- 2.2. Acts of workplace violence may also be addressed through criminal proceedings.

### **3. Definitions**

- 3.1. Workplace violence includes any physical or verbal behavior that endangers or harms another employee, customer, contractor or vendor, or that a reasonable person would perceive to constitute a threat of harm.
- 3.1.1. Acts of violence may occur between fellow employees; between customers, contractors, or vendors and employees; or between employees and non-employees with whom they have a personal relationship.
- 3.2. The Intercity Transit workplace consists of all locations in which Intercity Transit business is conducted and surrounding areas, including but not limited to buildings, vehicles, transit centers, parking lots, adjacent sidewalks, driveways, and other facilities.
- 3.3. A “dangerous weapon” would include biological contaminants, dangerous chemicals, explosives, blackjacks, sand-clubs, metal knuckles, chako sticks, throwing stars, switchblade knives, any knife having a blade more than three and one-half (3 1/2 ") in length or any fixed-blade knife.
- 3.3.1. A fixed blade knife is any knife with a blade which is permanently open and does not fold, retract or slide into the handle of the knife, any dagger, sword, bayonet, bolo knife, hatchet, axe, straight-edged razor, or razor blade not in a package, dispenser or shaving appliance.
- 3.3.2. Objects not designed as weapons, but used to inflict or threaten bodily harm will also be considered dangerous weapons.
- 3.4. “Domestic violence” includes abusive behavior that is physical, sexual, psychological, or economic.

### **4. Examples of Prohibited Conduct**

- 4.1. Acts of workplace violence may take a variety of forms, including but not limited to:
- 4.1.1. Deliberate actions or behavior resulting in a physical assault against a person or property, such as hitting, pushing, holding/restraining, spitting on, or blocking the movement of another person.
- 4.1.2. Verbal or written threats communicated directly or indirectly that a reasonable person would perceive to intimidate, frighten or otherwise cause fear of physical or emotional harm.
- 4.1.2.1. Using agency mail, email, or telephones to communicate threats is expressly prohibited.
- 4.1.3. Inappropriate verbal or physical behavior that causes a reasonable person to feel unsafe, such as angry outbursts, throwing things, or expressions of hostility.

### **5. Employee Possession of Firearms and Weapons Prohibited**

- 5.1. Intercity Transit prohibits the possession or use of firearms and other dangerous weapons by its employees while performing job duties or in the Intercity Transit workplace.
- 5.2. Where there is sufficient cause or reason to believe that a threat to workplace security or public safety exists, or where a violation of any Intercity Transit policy has occurred, Intercity Transit reserves the right to conduct a search of employee work spaces and vehicles.

**6. Threats of Domestic Violence at Work**

- 6.1. Any employee who is a victim of domestic violence shall report behavior that threatens the employee at work.
- 6.2. Reports may be made to the employee's supervisor, a manager or Human Resources. Intercity Transit will work with the employee to enhance his or her safety and security at work, at the same time endeavoring to maintain privacy.

**7. Investigation of Reports of Workplace Violence.**

- 7.1. Investigations will be made promptly, impartially and discreetly. When appropriate, disciplinary action will be imposed, up to and including discharge. Violators may also be subject to criminal prosecution, if applicable. The Human Resources Director has the responsibility for investigating such reports.

**8. Employee Responsibilities:**

- 8.1. Any Intercity Transit employee who reasonably believes the words or actions of another employee, customer, contractor, vendor, or visitor constitutes a violation of this Rule has the responsibility to report such behavior immediately to one or more of the following: a supervisor, manager or Human Resources.
- 8.2. Supervisors, managers, Human Resources, and any other Intercity Transit staff who receive reports of workplace violence or observe such behavior directly have the responsibility to take prompt action to see that an investigation is initiated.
- 8.3. In the event of an immediate threat or danger, employees should not confront the threatening party. In such case, employees should immediately retreat and call 9-1-1 if appropriate. Use of force by an employee is acceptable when in accordance with RCW 9A.16.020. The incident should be reported to a supervisor, manager or Human Resources as soon as possible.
- 8.4. Retaliation against employees who report acts of workplace violence is prohibited.
  - 8.4.1. Instances of retaliation will be investigated and appropriate disciplinary action taken against the actor, up to and including discharge and possible criminal and civil prosecution.

## 511 – Discipline

### 1. Rule Statement

- 1.1. Intercity Transit hereby provides notice to all employees that discipline may be imposed for substandard performance, unacceptable or prohibited conduct or as otherwise appropriate.
  - 1.1.1. This rule and associated procedures are necessary for the orderly, safe and efficient operation of transit services and endeavors to provide equitable treatment of all employees.
- 1.2. Employees are responsible for using reasonable judgment at all times or seeking supervisory advice in doubtful situations.
- 1.3. Intercity Transit resolves conduct and performance problems in the most informal and constructive manner possible, including the use of:
  - 1.3.1. counseling
  - 1.3.2. coaching
  - 1.3.3. additional training
  - 1.3.4. augmented supervision
  - 1.3.5. verbal cautions or notifications
  - 1.3.6. other non-disciplinary interventions
- 1.4. Intercity Transit may also determine certain circumstances warrant disciplinary action, up to and including termination.
- 1.5. The Human Resources Director will be responsible for the proper handling of such matters, including the assurance that employee rights are protected, and appropriate action is taken when circumstances warrant.

### 2. Examples of Circumstances Leading to Discipline

- 2.1. Examples of unacceptable conduct precipitating disciplinary action include, but are not necessarily limited to:
  - 2.1.1. Attendance/Timeliness
    - 2.1.1.1. Improper or unauthorized use or abuse of paid sick leave.
    - 2.1.1.2. Excessive absenteeism, regardless of reason.
    - 2.1.1.3. Being absent without proper authorization.
    - 2.1.1.4. Late arrival or early departure from work.
  - 2.1.2. Conduct
    - 2.1.2.1. Willful or negligent violation of Intercity Transit policies, procedures, Rules, unit operating rules, or related directives.
    - 2.1.2.2. Failure to carry out a direct order from a supervisor.
      - 2.1.2.2.1. A limited exception may apply in circumstances where it is shown the employee's safety was in serious jeopardy due to the supervisor's directive.
    - 2.1.2.3. Deliberately or knowingly engaging in conflict of interest activity.
    - 2.1.2.4. Making malicious or false, statements that may damage the integrity or reputation of Intercity Transit or its employees; to include willful misrepresentation of Intercity Transit.
    - 2.1.2.5. Falsification, removal, or destruction of information related to employment, payroll or work-related records or reports.
    - 2.1.2.6. Discourteous treatment toward the public, including, but not limited to the use of profane or disrespectful language, harassment conduct, or coercing, threatening, or intimidating acts.
    - 2.1.2.7. Discourteous treatment toward co-workers, supervisory personnel or customers, including, but not limited to, the use of profane or disrespectful language, harassment conduct, or coercing, threatening or intimidating acts.

- 2.1.2.8. Conduct that interferes with the management of Intercity Transit operations.
  - 2.1.2.9. Violation or neglect of safety rules, or contributing to hazardous conditions; negligence that results in injury to an employee, self, or visitor; or failure to promptly report a work-related injury or accident.
  - 2.1.2.10. Unauthorized removal of or use of any Intercity Transit property or property of its customers or agents.
  - 2.1.2.11. Physical altercations on Intercity Transit property with co-workers or customers, unless such altercations are absolutely necessary for self-defense purposes.
  - 2.1.2.12. Conducting illegal gambling activities on Intercity Transit property.
  - 2.1.2.13. Conduct that represents sexual harassment.
  - 2.1.2.14. Conduct that is discriminatory toward another race, color, religion, gender, marital status, familial status, national origin, age, mental or physical disability, sexual orientation, gender identity, or veteran status.
  - 2.1.2.15. Possession, display, or use of firearms, explosives or other dangerous weapons while on duty, on Intercity Transit property or in Intercity Transit vehicles.
  - 2.1.2.16. Improper use of Intercity Transit electronic and/or communications resources.
  - 2.1.2.17. Unauthorized signing of another employee's "time card" or recording the time of another employee. Both employees may be subject to disciplinary action.
  - 2.1.2.18. Use of Intercity Transit vehicles without prior approval or unlawful operation.
  - 2.1.2.19. Encouraging or engaging in any unlawful work stoppages, slowdowns, walkouts, cessation of work or any other activity designed to restrict or delay the delivery of or receipt of services by Intercity Transit.
  - 2.1.2.20. Any violation of these Rules or any operative department rules, procedures, notices, directives, orders or other similar announcements.
  - 2.1.3. Conviction of a crime, including convictions based on a plea of nolo contendere (no contest), based on the degree to which the conviction of a crime affects an employee's ability to perform his/her regular duties. This determination would include, but is not necessarily limited to:
    - 2.1.3.1. the nexus between the type of crime and the employee's regular duties.
    - 2.1.3.2. the impact any post-conviction judicial or administrative orders, limitations placed on the employee or sentence may have on the employee's ability to perform his/her regular duties
- 2.2. Performance
- 2.2.1. Inefficiency, incompetence, or negligence in the performance of duties, including failure to perform assigned tasks or training, or failure to discharge duties in a prompt, courteous, and reasonable manner.
  - 2.2.2. Refusal or inability to improve job performance in accordance with written or verbal direction after a reasonable period.
  - 2.2.3. Refusal to accept reasonable and proper assignments, from an authorized supervisor.
  - 2.2.4. Possessing or being under the influence of alcohol, illegal drugs or controlled substances in reporting to work, while on duty, or while on Intercity Transit property.
  - 2.2.5. Driving Intercity Transit vehicles under the influence of alcohol, drugs or controlled substances; driving with a suspended license; or driving without a valid license.
  - 2.2.6. Failure to report suspension of driver's license where job duties require driving.
  - 2.2.7. Careless, negligent, or improper use of Intercity Transit property, equipment or funds, including unauthorized removal, or use for private purpose, or use involving damage or unreasonable risk of damage to property.
  - 2.2.8. Unauthorized release of confidential information or official records.
  - 2.2.9. Sleeping while on duty.

2.2.10. Abuse of break times, lunch periods, or paid or unpaid leaves.

### **3. Considerations in Implementing Discipline**

- 3.1. Supervisory and management personnel shall be guided in their consideration of disciplinary matters by the following illustrative, but not inclusive, conditions:
- 3.1.1. The degree of severity of offense.
  - 3.1.2. Previous warnings provided to the employee.
  - 3.1.3. The number, nature, and circumstances of past offenses or prior discipline.
  - 3.1.4. The employee's length of service.
  - 3.1.5. The employees' overall job performance record.
  - 3.1.6. Provocation, if any, contributing to the offense.
  - 3.1.7. Parity in the application of discipline.
  - 3.1.8. Equity and relationship of penalty to offense.

### **4. Notice of Discipline**

- 4.1. Notices of discipline shall be provided to employees either verbally or in writing.
- 4.1.1. Verbal notice of discipline may be appropriate for matters that are not of a serious nature, but more serious discipline, including and not necessarily limited to, reprimands, suspensions, demotions and terminations shall be communicated in writing to the employee.
- 4.2. Notices of written discipline shall, as a minimum, contain the following information:
- 4.2.1. A statement of the disciplinary action being imposed and its effective date.
  - 4.2.2. A statement of the reasons for imposing the discipline and the nature of the violation.
  - 4.2.3. Summary material or evidence referenced by the manager or supervisor who is imposing the discipline.
  - 4.2.4. The date of the disciplinary action.
  - 4.2.5. The signature of the supervisor administering the disciplinary action.
  - 4.2.6. The signature of the employee showing the employee has been afforded the opportunity to review the discipline.
    - 4.2.6.1. The employee's signature does not necessarily mean the employee fully agrees with the contents of the disciplinary action, and the employee may so state on the form before signing the disciplinary action form or record.
  - 4.2.7. Employees subject to written discipline shall be provided a true copy of the disciplinary document.
  - 4.2.8. Service of disciplinary notices and true copies thereof will be deemed to have been made upon personal presentation, or by depositing the notice in the U.S. mail in accordance with normal business practices, addressed to the employee's last known address on file.

### **5. Types of Discipline**

- 5.1. Employment with Intercity Transit is not for a fixed term or definite period, and may be terminated at any time either by Intercity Transit or by the employee. Nevertheless, Intercity Transit promotes a disciplinary procedure managers and supervisors shall normally follow when exercising their right to discipline an employee up to and including termination.
- 5.2. Discipline will normally be progressive and bear a reasonable relationship to the violation. The following types of discipline that may occur are listed in general order of increasing formality and seriousness. The steps listed are meant to be a general guideline only. Any of the steps mentioned may be applied based on the circumstance and severity of the incident.
- 5.2.1. An employee may be given notice, coaching or counseling through an informal discussion with the employee pointing out an unsatisfactory element of job performance.

- 5.2.1.1. This type of discipline is applied for infractions or violations of a relatively minor degree.
- 5.2.1.2. A brief record of the verbal discussion is made by the supervisor and forwarded to Human Resources for placement in the employee's personnel file.
- 5.2.2. An employee may be given a written reprimand such as a formal statement by the supervisor to an employee pointing out an unsatisfactory element of job performance or unacceptable conduct.
  - 5.2.2.1. This type of discipline is applied when the employee continues to violate policies or procedures, repeats a violation, or when the violation is deemed to be more serious in nature than that of a minor violation.
  - 5.2.2.2. A formal record of the written reprimand is made, to include the date and content of the reprimand, and forwarded to Human Resources for placement in the employee's personnel file.
- 5.2.3. An employee may be suspended without pay by providing the employee a formal statement by the supervisor to an employee pointing out a serious unsatisfactory element of job performance or unacceptable conduct.
  - 5.2.3.1. This type of discipline is normally applied as a result of serious infractions, or continued violations of policies or procedures, or for violations after a Written Reprimand has been imposed.
  - 5.2.3.2. Employees designated as exempt from the Fair Labor Standards Act (FLSA) are not subject to disciplinary suspension of less than one week except in the case of major safety violations, which warrant serious discipline.
  - 5.2.3.3. An employee may be suspended from work without pay for up to ten (10) working days by authority of the department director and concurrence with the Human Resources Director.
    - 5.2.3.3.1. Suspensions of a longer duration require the approval of the General Manager.
  - 5.2.3.4. All suspensions shall be immediately reported to the General Manager.
  - 5.2.3.5. In no event will the use of paid time be allowed during a period of suspension without pay.
    - 5.2.3.5.1. Should a paid observed holiday occur during a period of suspension without pay, the suspension period will be extended by the number of holidays occurring during the suspension period.
  - 5.2.3.6. A formal record of the suspension is made, to include the date and the circumstances leading to the suspension, and forwarded to the Human Resource Director for placement in the employee's personnel file.
  - 5.2.3.7. Unless otherwise directed, an employee subject to a disciplinary suspension shall also have his/her employment related access to Intercity Transit facilities barred.
    - 5.2.3.7.1. This does not, of course, prevent the suspended employee's access to Intercity Transit facilities as a transit customer during the period of suspension.
- 5.2.4. An employee may be demoted from his/her employment from Intercity Transit.
  - 5.2.4.1. This type of disciplinary action is normally applied as a result of severe infractions, or continued violations of policies or procedures, or for violations after a Suspension without Pay has been imposed.
    - 5.2.4.1.1. Normally a disciplinary demotion is reserved for those instances where an employee performed successfully in a lower classification and where opportunities are extant to which the employee can be demoted.



5.2.4.1.2. Recommendations to demote an employee shall be made by the department director with the concurrence of the Human Resources Director, and subject to the approval of the General Manager

5.2.5. An employee may be discharged from his/her employment from Intercity Transit.

5.2.5.1. This type of disciplinary action is normally applied as a result of severe infractions, or continued violations of policies or procedures, or for violations after a Suspension without Pay has been imposed.

5.2.5.2. Recommendations to discharge an employee shall be made by the department director with the concurrence of the Human Resources Director, and subject to the approval of the General Manager.

## **6. Pre-Disciplinary Meeting**

6.1. The Human Resources Director will provide for and arrange a pre-disciplinary meeting prior to Intercity Transit implementing any final decision involving a suspension, demotion or termination of an employee.

6.1.1. The employee will be provided, in writing, proper notice of the infraction the proposed disciplinary action and the time and location of the pre-disciplinary meeting.

6.1.1.1. The notice shall contain an explanation of the reasons for the proposed action and the types of evidence on which the reasons are based. The notice shall inform the employee that the employee may respond orally and/or in writing, may present rebuttal evidence or information, may have access to evidence or material on which the reasons for the proposed action are based pursuant to the Public Records Act, and may have the assistance of counsel. The notice shall also inform the employee that he or she has a right to a name-clearing hearing as part of the Pre-Disciplinary Meeting pursuant to HRR 604.7.

6.1.1.1.1. This does not bar Intercity Transit from presenting at subsequent meeting(s) more detailed and/or complete information, or additional information learned in course of considering and imposing discipline, or the presentation of witnesses and/or documents not available or not used at any prior pre-disciplinary meeting.

6.1.1.1.2. The employee may also have access to material pursuant to the Public Records Act.

6.1.2. The employee will be given an opportunity to respond verbally or in writing as to the proposed disciplinary action and provide mitigating circumstances the employee wishes Intercity Transit to consider before imposing any discipline.

6.1.3. The employee may have legal counsel or a representative of their choice at a pre-disciplinary meeting.

6.1.3.1. If the employee is a member of a collective bargaining unit, the legal counsel or representative referenced above shall be authorized by the involved collective bargaining agent.

6.1.4. Failure of the part of an employee to attend a pre-disciplinary meeting may be taken into consideration by Intercity Transit when implementing a final action in the discipline.

## **7. Notice of Suspension, Demotion or Discharge**

7.1. All final disciplinary action that involves a suspension of more than ten (10) days, demotion or discharge must be approved by the General Manager.

7.2. Written notice of the discipline shall be given to the employee in any matter involving a disciplinary suspension, demotion or discharge. Such notice will include the alleged infraction and a general statement of the reasons for the action, and become a part of the employee's

personnel file.

## **8. Administrative Leave**

- 8.1. Under certain circumstances, it may be necessary to restrict an employee immediately from performing duties at the work site or bar the employee access to Intercity Transit facilities during a workplace investigation or pending the outcome of the disciplinary process. An employee may be placed on administrative leave in such circumstances.
- 8.2. Because there could be a need for immediate action, the decision to place an employee on administrative leave shall be the responsibility of the supervisor. Unless otherwise determined by the Human Resources Director or the General Manager, the employee shall be placed on paid administrative during the administrative leave period.
  - 8.2.1. While on paid administrative leave the employee may be directed to be immediately accessible in person or by telecommunication during the employee's normal work hours.
  - 8.2.2. Unless otherwise directed, an employee subject to administrative leave shall also have his/her employment related access to Intercity Transit facilities barred.
    - 8.2.2.1. This does not, of course, bar the employee's access to Intercity Transit facilities as a transit customer during the period of the administrative leave.
  - 8.2.3. The placement of an employee on administrative leave shall be immediately reported to the department director, the Human Resources Director and the General Manager.

## **601 – Workplace Safety**

### **1. Safety and Enforcement of Safety Rules**

- 1.1. It is the intent of Intercity Transit to provide for the continuous development, implementation, and maintenance of an ongoing program that promotes a healthy and safe work environment for all employees. Intercity Transit's efforts to promote and maintain a safe work environment include regular meetings of a safety committee, accident prevention and investigation, training, work place inspections, recordkeeping and incident reporting.
- 1.2. Intercity Transit's safety rules and practices will be strictly enforced. Employees will be subject to disciplinary action, up to and including termination of employment, if determined to be in violation of established safety rules or willfully negligent in the safe performance of their jobs.

### **2. Assignment of Responsibilities**

- 2.1. It will be the responsibility of the Human Resources Director to manage Intercity Transit's safety program, including record keeping and processing of injury reports, safety records, and safety training.
- 2.2. All employees will be held responsible at all times to observe and practice the highest possible standards of health and safety in carrying out assigned duties.
- 2.3. Managers and supervisors will:
  - 2.3.1. Be responsible for enforcement of safety rules among employees under their supervision.
  - 2.3.2. Be responsible for familiarizing employees with the hazards of the job to which they are assigned, and will instruct their personnel in the safe methods of performing the job.
  - 2.3.3. Periodically review the work practices of employees whom they supervise to ascertain that employees continue to work in a safe manner, and in accordance with the safe practices covering specific work.
  - 2.3.4. Periodically inspect work areas, vehicles and equipment for proper housekeeping, for fire or other hazards, and for unsafe conditions.
  - 2.3.5. Report all injuries promptly to the Human Resources Director or the designee.

### **3. General Safety Rules**

- 3.1. The following general safety rules apply to all Intercity Transit employees. Each department may implement separate safety rules applicable to the specific nature of work in their area, but they should not conflict with these general rules.
  - 3.1.1. No employee will knowingly be assigned to work under unsafe conditions or with unsafe tools or equipment. In the event that such a condition develops, it will be immediately reported to the supervisor, who will make the determination as to whether the condition or equipment is safe or unsafe.
    - 3.1.1.1. Employees are expected to abide by the supervisor's determination of the situation. If the employee refuses to abide by the supervisor's determination, he/she may be subject to disciplinary action.
  - 3.1.2. Employees shall pay strict attention to their work and avoid unsafe conduct.
    - 3.1.2.1. As an example and not by limitation, practical joking and horseplay will not be tolerated.
  - 3.1.3. Warning signs and signals posted to point out dangerous conditions are to be obeyed by employees.
  - 3.1.4. Employees shall not take shortcuts in, or over, dangerous places.
  - 3.1.5. Extreme caution shall be exercised by employees operating any type of power tool.
  - 3.1.6. Because of hazards inherent in running, employees shall refrain from running unless absolutely necessary to the performance of duty.

- 3.1.7. Employees shall use safety equipment appropriate to the job, such as safety glasses, gloves, toe guards, and hard hats, if required or appropriate to the work performed.
- 3.1.8. Employees shall avoid wearing loose clothing and jewelry while working on or near equipment and machines.
- 3.1.9. All accidents, regardless of severity, personal or vehicular, shall be reported immediately to the supervisor.
- 3.1.10. Employees in a business-use vehicle equipped with seat belts shall, in compliance with law, wear the seat belt when the vehicle is in operation.
- 3.1.11. All employees operating vehicles will observe all local traffic laws.
- 3.1.12. In all work situations, safeguards as required by state and federal safety orders will be provided.
- 3.1.13. Employees shall not use personal cell phones when operating an Intercity Transit vehicle.

#### **4. Hazardous Contents Protocols**

- 4.1. Container Labeling: The General Manager shall designate, in writing, a person responsible to verify containers received for use are properly labeled as follows:
  - 4.1.1. Contents clearly labeled:
    - 4.1.1.1. Appropriate hazard warning(s) noted.
    - 4.1.1.2. Name and address of manufacturer.
  - 4.1.2. The designee will ensure all secondary containers are labeled with an extra copy of the manufacturer's label or with a generic label which identifies the above information.
  - 4.1.3. The labeling system will be reviewed annually and updated as needed by the department designee.
- 4.2. Material Safety Data Sheets (MSDS) Workplace Surveys:
  - 4.2.1. Information on hazardous chemicals in the workplace shall be made available to all employees through Material Safety Data Sheets (MSDS) provided by the manufacturer or supplier or workplace surveys, if available.
  - 4.2.2. The MSDS are available for review.
    - 4.2.2.1. Any employee who desires to review an MSDS or workplace surveys should contact his or her supervisor.
- 4.3. New employees shall be trained about the particular chemicals used by employees within that department.
  - 4.3.1. Employees will verify they received the training and written materials (if applicable), and that the employee understands this rule.
  - 4.3.2. These records will be kept on file.
- 4.4. Retaliation against an employee for exercising any right in this subsection is prohibited as provided in RCW 49.70.110.

#### **5. Reporting On-The-Job Injuries**

- 5.1. Employees injured on the job, or whose injuries are directly related to the performance of job duties, are required to report all injuries to their supervisor immediately, regardless of how minor the injury may be.
  - 5.1.1. If medical care is needed immediately, supervisors shall assist employees in getting the necessary medical attention promptly, after which the full details of the injury are to be reported to the Human Resources Director, or designee, on prescribed accident/injury report forms.
- 5.2. Failure to properly report an accident/ injury may be cause for disciplinary action.

## **602 – Communicable Diseases**

### **1. Bloodborne Pathogens**

- 1.1. Intercity Transit is committed to maintaining a healthy and safe work environment for employees. Occupational Safety and Health Administration (OSHA) regulates facilities where employees could be exposed to bloodborne pathogens by promoting safe work practices to minimize the incidence of disease caused by these pathogens. Relative to this goal, OSHA enacted the Bloodborne Pathogen Standard (29CFR1910.1030). The purpose of the standard is to reduce occupational exposure to human bloodborne pathogens that employees may come in contact with in the workplace and to establish a framework for training and medical response.
- 1.2. Bloodborne pathogens include, but are not limited to
  - 1.2.1. Hepatitis B virus (HBV).
  - 1.2.2. Hepatitis C virus (HCV).
  - 1.2.3. Human Immunodeficiency Virus (HIV).

### **2. Responsibilities of Employees with a Bloodborne Pathogen Infection**

- 2.1. Intercity Transit recognizes that HBV, HCV or HIV may pose substantive issues for employees in the workplace. Accordingly, the following guidelines are operative:
  - 2.1.1. Persons with a bloodborne pathogen infection are urged to share information concerning their ability to perform assigned work with management for the purpose of reasonable accommodation and/or referral to the Employee Assistance Program.
  - 2.1.2. Self-disclosure of bloodborne pathogen infection is voluntary. Harassment and/or disparate treatment are prohibited.

### **3. Confidentiality**

- 3.1. Confidentiality of all employee medical records shall be maintained in accordance with all applicable federal and state laws.

### **4. Discrimination Prohibited**

- 4.1. Intercity Transit managers or supervisors are prohibited from discrimination because a person is or is believed to be HBV, HCV or HIV infected. Exclusion, refusal to hire or promote or the discharge of a person infected with HBV, HCV or HIV or believed to be infected, from any position on the basis of that infection or belief is prohibited.
  - 4.1.1. The individual must be able to perform the essential duties of the job and;
  - 4.1.2. It must be determined that the individual does not pose a safety risk to other employees or the public.
- 4.2. A competent medical authority designated by Intercity Transit may be called upon to evaluate the severity of such a risk. Persons who believe they have been discriminated against on the basis of a bloodborne pathogen infection are protected under Intercity Transit's rules of nondiscrimination and may contact their supervisor or Human Resources for assistance.
- 4.3. Employees are not permitted to refuse to work with a fellow employee or member of the public who has, or is suspected of having, a bloodborne pathogen infection. An employee who is concerned about the risk of exposure from others should review their concerns with a supervisor or Human Resources.

## 603 – “Whistleblower” Protection

### 1. Purpose and Scope

- 1.1. The purpose of this Rule is to protect employees of Intercity Transit from retaliation because the employee provided information that an improper governmental action occurred.

### 2. Definitions

- 2.1. "Improper governmental action" means any action in performance of an official duty by an officer or employee on Intercity Transit, either within or outside the scope of employment, that is in violation of any federal, state, or local law or rule, is an abuse of authority, is of substantial and specific danger to the public health or safety, or is a gross waste of public funds.
  - 2.1.1. By way of illustration and not by limitation, "improper governmental action" does not include personnel actions including but not limited to employee grievances, complaints, appointments, promotions, transfers, assignments, reassignments, reinstatements, restorations, reemployment, performance evaluations, reductions in pay, dismissals, suspensions, demotions, violations of the local government collective bargaining and civil service laws, alleged labor agreement violations and reprimands or other action set out in RCW 42.41.020.
- 2.2. "Retaliatory action" means a) Any adverse change in a local government employee's employment status, or the terms and conditions of employment including denial of adequate staff to perform duties, frequent staff changes, frequent and undesirable office changes, refusal to assign meaningful work, unwarranted and unsubstantiated letters of reprimand or unsatisfactory performance evaluations, demotion, transfer, reassignment, reduction in pay, denial of promotion, suspension, dismissal, or any other disciplinary action; or (b) hostile actions by another employee towards a local government employee that were encouraged by a supervisor or senior manager or official..

### 3. Initial Notice Requirements

- 3.1. Any employee seeking relief under this procedure must provide the General Manager or the Chair of the Intercity Transit Authority written notice of a charge that the employee was subject to a retaliatory action because the employee provided information that an improper governmental action occurred. Such written notice shall specify:
  - 3.1.1. The alleged retaliatory action taken; and
  - 3.1.2. The relief requested.
- 3.2. The written notice of the alleged retaliatory action and requested relief shall be delivered to the General Manager or the Chair of the Authority within thirty (30) calendar days after the occurrence of the alleged retaliatory action.
  - 3.2.1. The written notice may be delivered in a sealed envelope.
  - 3.2.2. Unless there is an emergency that requires immediate attention to prevent damage to persons or property, the employee will submit written notice before providing information of improper governmental activity to any other person.

### 4. Review of Provided Notice

- 4.1. Allegations of retaliatory action made by employees shall be addressed as provided under RCW 42.41.040 through 42.41.900.

## 604 – Grievance Procedure

### 1. Scope of Rule

- 1.1. Except as provided herein, this grievance procedure shall apply to all employees of Intercity Transit.
- 1.2. Employees who are members of a collective bargaining unit are excluded from this grievance procedure and shall follow the grievance procedure established in their respective collective bargaining *Agreement*.

### 2. Purpose of Rule

- 2.1. The purpose of this Rule and the procedure herein is to provide employees an organized procedure for addressing perceived problems and provide a means by which they can pursue the resolution of disputes with Intercity Transit.
- 2.2. Subject to exclusions referenced below, this Rule and the procedure provided herein are specifically limited to matters of an employee's working conditions (e.g. an alleged violation of operative policy, rules or safety concerns, wage issues, performance ratings, disciplinary action taken, conduct involving harassment or discrimination).
- 2.3. Employees are strongly encouraged to discuss any problems or complaints with their immediate supervisor or department director prior to initiating these formal review procedures. However, if an employee feels that all informal avenues have been exhausted and their problem or complaint has not been resolved, the employee may follow the more formal dispute resolution steps as provided herein.
- 2.4. The procedure provided herein is not intended to be a means by which employees can address disputes with each other.

### 3. Grievance Procedure Protocols

- 3.1. Employees shall normally present their own issues or disputes to their immediate supervisor.
- 3.2. Irrespective of the procedure provided below, disputes involving alleged discrimination on the basis of an individual's race, color, religion, gender, marital status, familial status, national origin, age, mental or physical disability, sexual orientation, gender identity, or veteran status may be submitted directly to the Human Resources Director.

### 4. Grievance Resolution Procedure

- 4.1. Prior to initiating these formal procedures, an employee shall informally discuss the situation or dispute with the employee's supervisor.
- 4.2. STEP 1: An employee having a grievance, as defined in Section 2.2 above, shall make every effort to resolve the matter through formal discussion with their immediate supervisor within fourteen (14) calendar days of the occurrence or cause of such matter.
  - 4.2.1. To be operative, a written grievance must contain:
    - 4.2.1.1. A written explanation of the circumstances associated with the grievance.
    - 4.2.1.2. A citation of the rules or policy alleged to have been violated.
    - 4.2.1.3. The employee's rationale for why the referenced rule or policy has been violated.
    - 4.2.1.4. The desired remedy.
    - 4.2.1.5. The employee's rationale as to why the desired remedy is an appropriate resolution to the dispute.
    - 4.2.1.6. The date on which the grievance is submitted.
    - 4.2.1.7. The signature of the employee.
  - 4.2.2. A copy of the grievance shall be forwarded immediately by the employee to the involved department director and the Human Resources Director.

- 4.2.3. The supervisor shall take the matter under consideration and attempt to respond in writing to the grievance within fourteen (14) calendar days from the date on which the grievance was submitted.
  - 4.2.3.1. A copy of the written response shall be forwarded to the department director and the Human Resources Director.
- 4.3. **STEP 2:** If the supervisor fails to respond to the employee's grievance, or if the grievance response is not to the employee's satisfaction, the aggrieved employee may file a Step 2 review request. The Step 2 review request must include the information as required in Section 4.2.1 herein, recorded on the prescribed grievance form and be submitted to the employee's department director and the Human Resources Director within fourteen (14) calendar days following the supervisor's Step 1 response.
  - 4.3.1. The Human Resources Director or a designee within the Human Resources Department shall arrange a meeting with the employee to allow the employee to present a personal and complete description of the situation.
    - 4.3.1.1. The employee may review relevant Intercity Transit records in advance of the meeting, pursuant to the state Public Records Act.
    - 4.3.1.2. At the meeting the employee has the right to present verbal and documentary evidence from himself and others and to present reasons and argument as to why the employee's requested relief should be granted.
  - 4.3.2. Thereafter, the Human Resources Director or a designee within the Human Resources Department will take the matter under consideration, including any appropriate investigation or evaluation of the facts related to the situation. The Human Resources Director or a designee within the Human Resources Department will render a written decision, response, or explanation within fourteen (14) calendar days following receipt of the Step 2 meeting as referenced in Section 4.3.1 above, unless additional time is needed to gather adequate information.
    - 4.3.2.1. If additional time to respond is required by the Human Resources Director or a designee within the Human Resources Department, the employee shall be notified as to the anticipated date of the response.
  - 4.3.3. A copy of the written decision by the Human Resources Director or designee within the Human Resources Department shall be forwarded to the involved department director.
- 4.4. **STEP 3:** If an employee is not satisfied with the Human Resources Director's or designee's response, the employee may file a Step 3 review request. A Step 3 review request must include the information as required in Section 4.2.1 herein, to the General Manager within seven (7) calendar days following the Step 2 response by the Human Resources Director or designee.
  - 4.4.1. The employee shall also forward a copy of the Step 3 appeal to the Human Resources Director.
  - 4.4.2. The General Manager shall review the grievance and provide the employee with a written response within fourteen (14) calendar days following receipt of the Step 3 appeal. If additional time to respond is required by the General Manager, the employee shall be notified as to the anticipated date of the response.
  - 4.4.3. A copy of the General Manager's written response shall be forwarded to the Human Resources Director and the involved department director.
  - 4.4.4. The General Manager's response shall be final and binding to all parties involved.

## 5. Name Clearing Hearing

- 5.1. An employee has the right to a name-clearing hearing if he or she reasonably believes that Intercity Transit has placed stigmatizing material in the employee's file or has otherwise made such material public.



- 5.1.1. The “name clearing hearing” may be requested through the grievance procedure, through the pre-disciplinary meeting in HRR 511, or independently.
- 5.1.2. Stigmatizing material means information which is deemed stigmatizing under the case law on due process liberty interests. Such material generally includes allegations of improper conduct that impairs an employee's reputation for honesty or morality, or that imputes immoral, illegal or dishonest behavior.
- 5.1.3. Allegations of mere inadequate job performance are not deemed stigmatizing
- 5.2. An employee seeking a name clearing hearing, as provided herein, shall request same within fourteen (14) calendar days of the occurrence or cause precipitating the employee's request or from the time the employee could have reasonably discovered the occurrence or cause precipitating such a request.
- 5.3. The Human Resources Director or designee shall normally conduct the name clearing hearing.
- 5.4. At the hearing, the employee may present evidence and information, verbally or in writing, showing that any stigmatizing factual assertions or other material placed in Intercity Transit files or otherwise made public by Intercity Transit are false, irrelevant or should be removed for any other reason. The Human Resources Director or designee shall consider all evidence and information presented by the employee and may retain, remove or modify the material claimed to be stigmatizing

## **6. Time Limits**

- 6.1. If the herein stated procedures are not initiated within the prescribed time limits, the grievance or request for a name clearing hearing will be considered null and void and any further appeal on the part of an employee to pursue the matter will be barred.
- 6.2. Any grievance not taken to the next step in the Grievance Resolution Procedure shall be considered settled on the basis of the last reply made and received in accordance with the above provisions.
- 6.3. If Intercity Transit fails to meet or answer any grievance within the time limits prescribed for such action, such grievance may be appealed by the employee to the next step.

## **7. Discrimination and Harassment Prohibited**

- 7.1. No employee shall be disciplined or discriminated against in any way because of the employee's proper use of these procedures.
  - 7.1.1. Employees who deliberately misuse the grievance procedures or who file fraudulent grievances shall be subject to disciplinary action, up to and including termination of employment.



**Cancels: Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; 4/02, 9/08, 2/09, 10/09; Policy HR-3511 dated October 7, 2009, November 4, 2009, December 1, 2010, and July 14, 2014,**

## **POLICY-HR-3511**

See Also:

Approved by:  11-4-14  
Intercity Transit Authority

Written by: Christine DiRito



Ann Freeman-Manzanares, General Manager

### **Intercity Transit Drug and Alcohol Testing Policy and Program**

#### **1.0 POLICY STATEMENT**

Intercity Transit strives to provide safe, dependable, and economical transportation services to our transit system passengers. Intercity Transit employees are our most valuable resources. It is our goal to provide a healthy, drug and alcohol free work environment which promotes personal opportunities for growth. To meet these goals Intercity Transit will:

- assure that employees have the ability to perform assigned duties in a safe, productive, and healthy manner;
- create a work environment free from the adverse effects of drug and/or alcohol misuse and abuse;
- prohibit the unlawful manufacture, distribution, dispensing, possession, or use of controlled substances; and
- encourage employees to seek professional assistance when personal problems, including alcohol or drug dependency, adversely affect their job.

#### **2.0 PURPOSE OF POLICY**

The purpose of this policy is to ensure worker fitness for duty and to protect our employees, passengers, and the public from the risks associated with the use of alcohol and/or drugs. This policy also intends to comply with applicable federal regulations governing workplace anti-drug and alcohol programs in the transit industry and any future regulations or changes that may occur.

The Federal Transit Administration (FTA) of the U.S. Department of Transportation (DOT) published 49 CFR Part 655 as amended, mandating urine drug testing and breath alcohol

**Cancels: Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.**

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testing for safety-sensitive positions and prohibits performance of safety-sensitive functions when there is a positive test result. DOT published 49 CFR Part 40, as amended, sets standards for the collection and testing of urine and breath/saliva specimens. The federal government published 49 CFR Part 29, "The Drug-Free Workplace Act of 1988," requires the establishment of drug-free workplace policies and the reporting of certain drug-related offenses to the FTA.

This policy incorporates those requirements for safety-sensitive employees and others when noted. \*

### 3.0 APPLICABILITY

#### 3.1 EMPLOYEES, CONTRACTORS AND VOLUNTEERS

**This policy applies in general to all safety-sensitive and non-safety sensitive transit system employees (full and part time), volunteers, visitors, vendors, contract employees and contractors when they are on transit property or when performing any transit-related safety-sensitive business or non-safety sensitive business. This policy applies to split assignments, off-site lunch periods and or breaks when an employee is scheduled to return to work. This policy also applies when any employee (safety or non-safety sensitive employee) is in a paid status, scheduled to work and or engages in any paid trainings, workshops, seminars, etc. either on or offsite.**

**Safety Sensitive volunteers are a covered employee if required to hold a CDL to operate the vehicle or performs a safety sensitive function and receives remuneration in excess of his/her actual expense incurred while in engaged in the volunteer activity.**

Intercity Transit will not permit such persons to conduct transit business if found in violation of this policy. Adherence to Intercity Transit's Drug and Alcohol Testing Policy and Program including requirements in Part 655 and Part 40 is a requirement of employment and a requirement for performance of transit-related services. Participation in the federally mandated testing program is a condition of performing safety sensitive functions. All employees found in violation of this policy are subject to discipline.

Employees shall promptly report to his/her supervisor or to the Drug and Alcohol Program Manager (DAPM) whenever he/she observes or has knowledge of another employee who may pose a hazard to the safety and welfare of others.

*\*All provisions set forth in bold face print are included consistent with requirements specifically set forth in 49 CFR Part 655, or Part 40, as amended, and the Drug Free Workplace Act (49 CFR Part 2). All other provisions are set forth under the authority of Intercity Transit.*

**Cancels: Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.**

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### **3.2 SAFETY-SENSITIVE FUNCTION DEFINED**

A safety-sensitive function is any duty related to the safe operation of mass transit service as defined in 49 CFR Part 655:

- **operation of a revenue service vehicle (whether or not the vehicle is in revenue service);**
- **operation of a non-revenue service vehicle when required to be operated by a holder of Commercial Driver's License;**
- **controlling dispatch or movement of a revenue service vehicle;**
- **maintenance (includes repairs, overhauls, and rebuilds) of a revenue service or equipment used in revenue service;**
- **security personnel who carry firearms;**
- **and any other employee who must hold a Commercial Driver's License to perform their job.**

**A list of positions designated safety-sensitive is attached (Appendix B).**

In addition, all employees of independent contractors who perform services for Intercity Transit in positions which are safety sensitive (as outlined above) will also be subject to program testing, including requirements set forth in Part 655 and Part 40.

### **3.3 DIRECTORS, MANAGERS AND SUPERVISORS**

Intercity Transit strives to ensure fair and equitable application of this drug and alcohol testing policy and program. It is a requirement of supervisory level staff to use and apply all aspects of this policy. Any supervisory level employee who knowingly disregards the requirements of this policy, or who is found to deliberately misuse the policy in regard to subordinates, shall be subject to disciplinary action, up to and including discharge.

Directors, managers and supervisors are considered safety-sensitive if they perform, or may be called upon to perform any of the above safety-sensitive functions.

**Cancels:** Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.

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### **4.0 PROHIBITED SUBSTANCES**

#### **4.1 ILLEGALLY USED CONTROLLED SUBSTANCES OR DRUGS**

A prohibited drug is any illegal drug or any substance identified in Schedule I through V of Section 202 of the Controlled Substance Act (21 U.S.C. 812) and as further defined by 21 CFR 1300.11 through 1300.15. This includes, but is not limited to: marijuana, amphetamines, opiates, phencyclidine (PCP), and cocaine, as well as any drug not approved for medical use by the U.S. Drug Enforcement Administration or the U.S. Food and Drug Administration. Illegal use includes the use of any illegal drug, the misuse of legally prescribed drugs, or the use of illegally obtained prescription drugs at any time.

The above drugs listed in this policy apply to both safety and non-safety sensitive employees. Regardless of WA ST Initiative 502, marijuana remains a Schedule I (illegal) drug under federal law and this policy states ". . . the use of an *illegal drug is prohibited at any time.*" Positive drug tests for safety or non-safety sensitive employees for THC/Marijuana will not be downgraded to a negative test based on an employee's explanation of "recreational, medical or legal" marijuana use.

#### **4.2 LEGAL DRUGS**

This policy does not prohibit the appropriate use of legally prescribed drugs and non-prescription medications. However, it is the responsibility of the employee to inform his/her physician when being prescribed medication(s) that they are covered under the terms of this policy. The employee shall use medically authorized drugs or over the counter medications in a manner which will not impair on-the-job performance. It is also the responsibility of the employees to remove themselves from service if they are not fit for duty because of any adverse effects due to medications.

A legally prescribed drug means that the individual has a prescription or other written approval, in the employee's name, from a physician for the use of the drug in the course of medical treatment. It must include the patient's name, the name of the substance, quantity/amount prescribed, and the period of authorization. Intercity Transit prohibits the misuse or abuse of legal drugs while performing transit business.

**Cancels: Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.**

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### **4.3 ALCOHOL**

This policy prohibits the use of beverages containing alcohol or substances, including any medication, mouthwash, food, candy, or any other substance such that alcohol is present in the body, while performing transit business.

### **5.0 PROHIBITED CONDUCT AND CONSEQUENCES**

#### **5.1 MANUFACTURE, TRAFFICKING, POSSESSION, AND USE**

**Transit system employees are prohibited from engaging in the unlawful manufacture, distribution, dispensing, possession, or use of prohibited substances on transit premises, in transit vehicles, in uniform, or while on transit business. Employees who violate this provision will be discharged and referred to a Substance Abuse Professional (SAP), or substance abuse counselor or EAP. Intercity Transit will not allow employees of contractors who violate this provision to continue to conduct business and will notify their supervisor, as appropriate. When Intercity Transit suspects criminal activity, they shall notify law enforcement, as appropriate.**

#### **5.2 DRUG AND ALCOHOL USE**

Employees, volunteers, contract employees or contractors must not report for work or continue working if they are not fit for duty because of the presence of prohibited substances or alcohol in their system. Intercity Transit will suspend from duties any safety-sensitive or non-safety-sensitive employee, contract employee, contractor, or volunteer reasonably suspected of being not fit for duty due to drug or alcohol use, pending an investigation of condition. (See Section 6.6 - Reasonable Suspicion). Intercity Transit defines "not fit for duty" as having a measurable presence of prohibited substances or alcohol in the system. **Employees who fail to pass a drug or alcohol test shall be removed from duty and subject to discipline up to and including discharge (see Sections 5.3 and 5.4).**

#### **5.3 TESTING POSITIVE ON A DRUG TEST**

**Any safety-sensitive or non-safety sensitive employee that has a confirmed positive drug test, for any type of tests, will be removed from their position and will be**

**Cancels:** Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.

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discharged. The person will be informed of education and rehabilitation programs available and referred to a SAP for assessment (SAP defined in Section 7.3). Non-safety sensitive employees will be referred to a Substance Abuse Counselor or EAP provider.

Any safety-sensitive or non-safety sensitive pre-employment applicant that fails a pre-employment drug test will not be hired and the person will be informed of education and rehabilitation programs available and referred to a SAP for assessment (SAP defined in Section 7.3). Non-safety sensitive employees will be referred to a Substance Abuse Counselor or EAP provider.

### **5.4 TESTING POSITIVE ON AN ALCOHOL TEST**

No safety-sensitive or non-safety-sensitive employee shall report for duty or remain on duty when their ability to perform assigned safety-sensitive or non-safety sensitive functions is adversely affected by alcohol or when alcohol is present in their body. No safety-sensitive or non-safety-sensitive employee shall use alcohol while on duty, in uniform, while performing safety-sensitive functions, or just before or just after performing a safety-sensitive function. No safety-sensitive or non-safety sensitive employee shall use alcohol within four hours of reporting for duty, or during the hours that they are on call. Employees in violation of these provisions will be subject to disciplinary action up to discharge.

Any safety-sensitive or non-safety sensitive pre-employment applicant that fails a pre-employment alcohol test will not be hired and the person will be informed of education and rehabilitation programs available and referred to a SAP for assessment (SAP defined in Section 7.3). Non-safety sensitive employees will be referred to a Substance Abuse Counselor or EAP provider.

A drug or alcohol test is considered positive and or a policy violation if the individual is found to have a quantifiable presence of a prohibited substance in the body above the minimum thresholds defined in 49 CFR Part 40, as amended.

**5.4.1** Any safety sensitive employee who tests positive for alcohol under the following types of testing (random, post-accident, reasonable suspicion, return to duty, follow-up) at ~~0.02 to~~ 0.04 levels or higher is not allowed to perform or continue performing safety sensitive duties, will be removed from the safety sensitive position, discharged and referred to a Substance Abuse Professional.

**5.4.2** Any safety sensitive employee who has a policy violation for alcohol under the following types of testing (random, post-accident, reasonable suspicion, return



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to duty, follow-up) at 0.02 -0.039 levels is not allowed to perform or continue to perform safety sensitive duties, will be removed from the safety sensitive position, discharged and referred to a Substance Abuse Counselor or EAP provider.

- 5.4.3 Non-safety-sensitive employees who have a ~~positive test~~ policy violation for alcohol, under any type of testing (post-accident, reasonable suspicion), at 0.02 to 0.04 levels or higher, will be removed from the non-safety-sensitive position, discharged and referred to a ~~SAP~~ Substance Abuse Counselor or EAP provider.

### **5.5 FAILURE TO COMPLY WITH TESTING REQUIREMENTS**

**All safety-sensitive and non-safety-sensitive employees will be subject to urine drug testing and breath/saliva alcohol testing. Any safety-sensitive or non-safety-sensitive employee who refuses to comply with a request for testing shall be removed from duty.**

**A refusal to test constitutes a violation of this policy and federal regulations. Such refusals will be treated as insubordination and recorded as a positive test, with the employee subject to discharge as called for in this policy.**

**Any safety-sensitive or non-safety-sensitive employee who is suspected of providing false information in connection with a test, or who is suspected of falsifying test through tampering, contamination, adulteration, or substitution will be required to undergo an observed collection by medical personnel. Verification of these actions will result in the employee's removal from duty and discharge.**

**As listed in 49 CFR Parts 655 the following is also considered a refusal to test if the employee:**

- **Fails to appear for any test within a reasonable time, as determined by the employer, after being directed to do so by the employer (except in a pre-employment test).**
- **Fails to remain at the testing site until the testing process is complete.**
- **Fails to provide a urine or breath/saliva specimen for any required drug test. In the case of a directly observed or monitored collection in a drug test; fails to follow the observer's instructions to raise your clothing above your waist, lower clothing and underpants and to turn around to permit the observer to determine if you have any type of prosthetic or other devices that could interfere with the collection process.**

**Cancels: Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.**

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- **Possesses or wears a prosthetic or other device that could be used to interfere with the collection process.**
- **Admits to the collector or MRO that you adulterated or substituted the specimen.**
- **Fails or refuses to provide a sufficient amount of urine or breath when directed, and it has been determined, through a required medical evaluation, that there was no adequate medical explanation for the failure.**
- **Declines to allow a directly observed and or monitored collection when required or permitted to occur.**
- **Fails or declines to take a second test the employer or collector has directed the employee to take.**
- **Fails to undergo a medical examination or evaluation as directed by the MRO as part of the verification process, or as directed by the Designated Employer Representative (DER) as part of the "shy bladder" or "shy lung" procedures.**
- **Fails to cooperate with any part of the testing process (e.g. refuse to empty pockets and fails to wash hands when so directed by the collector, behave in a confrontational way that disrupts the collection process).**
- **If the MRO reports that there are verified adulterated or substituted test results.**
- **Failure or refusal to sign Step 2 of the alcohol testing form.**
- **Leaves the scene of the accident without justifiable explanation prior to submission to drug and alcohol testing.**

### **5.6 FAILURE TO NOTIFY INTERCITY TRANSIT OF CRIMINAL CONVICTION OR DRIVING WHILE INTOXICATED CONVICTION**

**All employees are required to notify Intercity Transit (Human Resources) of any criminal drug statute conviction for a violation occurring in the workplace within five days after such conviction. Failure to report such conviction or any moving violation causing the loss of driver's license by state or local law enforcement involving drugs or alcohol shall result in disciplinary action, up to and including discharge.**

### **5.7 FAILURE TO COMPLY WITH TREATMENT REQUIREMENTS**

**Employees who refuse or fail to comply with Intercity Transit's requirements for treatment, after care, or return to duty when applicable are subject to disciplinary action, up to and including discharge. Intercity Transit encourages employees to make use of the available resources for treatment for alcohol misuse and drug use problems *before* the problem affect their employment status.**

**Treatment for substance abuse or alcohol misuse for safety sensitive or non-safety**

**Cancels: Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.**

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sensitive employees may be a requirement under certain circumstances. The cost of any treatment or rehabilitation services is the responsibility of the employee or their insurance provider. Employees may use accumulated sick leave and vacation leave to participate in the prescribed rehabilitation program. An employee may also use leave without pay, subject to the approval of the Human Resources Department.

### **6.0 TESTING PROCEDURES**

Intercity Transit affirms the need to protect individual dignity, privacy, and confidentiality throughout the testing process. If a represented employee requests Union representation prior to testing for reasonable suspicion, the supervisor or designee will notify the employee's Union representative of the Agency's intent to conduct the test. The testing will not be delayed if Union representation is not available.

Intercity Transit's alcohol and drug testing procedures incorporate all requirements outlined in the federal regulations. This ensures employee confidentiality and the integrity of the testing process, as well as safeguarding the validity of the test results. This also ensures that the test results are attributed to the correct employee. Intercity Transit is also responsible to ensure that blind testing samples are submitted to the testing laboratory for quality assurance and quality control measures. Procedures are in place to ensure that three quality control specimens are submitted to the laboratory for every 100 tests specimens sent for testing. A blind sample test is a urine specimen submitted to the laboratory for quality control testing purposes with a fictitious identifier and may be spiked with known quantities of specific drugs.

### **6.1 MEDICAL REVIEW OFFICER**

Intercity Transit or its designee will contract with a Medical Review Officer (MRO) to provide services established in 49 CFR Part 40. The MRO shall be a licensed physician with knowledge of substance abuse disorders. The role of the MRO is to review chain of custody forms, and review and interpret confirmed positive tests examining alternative explanations for any positive tests.

**All verified negative-dilute test results will be treated as a verified negative result.**

Prior to verifying a positive test, the MRO will contact the affected employee to discuss the test results. Following verification of a positive test result, the MRO shall contact the DAPM and the employee with that determination. The MRO shall contact the DAPM when an observed collection is required.

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Observed collections and or immediate re-tests are required when:

- The laboratory reports to the MRO that a specimen is invalid and the MRO reports to the DAPM there was not an adequate medical explanation for the result.
- The MRO reports that the original positive, adulterated, or substituted result had to be cancelled because the test of the split specimen could not be performed.
- The laboratory reports to the MRO that the specimen was a negative-dilute with a creatinine concentration greater than or equal to 2 mg/dL and less than or equal to 5 mg/dL
- A collector observes materials brought to the collection site or the employee's conduct clearly indicates an attempt to tamper with a specimen.
- The temperature on the original specimen was out of range.
- The original specimen appeared to have been tampered with.
- The employee is subject to return-to-duty and or follow-up tests.

### 6.2 METHODOLOGY

Testing shall be conducted in a manner to assure a high degree of accuracy and reliability and using techniques, equipment, and laboratory facilities which have been approved by the U.S. Department of Health and Human Services (DHHS). All testing will be conducted consistent with the procedures put forth in 49 CFR Part 40, as amended. Intercity Transit may conduct analytical urine drug testing and breath/saliva testing for alcohol when circumstances warrant or when Federal regulations require. All safety-sensitive and non-safety-sensitive employees shall be subject to testing for reasonable suspicion and following an accident, as defined in Sections 6.6 and 6.7 of this policy. All safety sensitive employees shall be subject to pre-employment and random testing, as defined in Sections 6.5 and 6.8 of this policy.

### 6.3 TESTING FOR DRUGS

Employees subject to drug testing under the Federal Transit Administration and under Intercity Transit's Authority (non -DOT) will use the split sample method of collection (Section 6.9). The chain of custody drug testing and control form will be used and

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properly executed by the authorized collection site personnel. The drugs that will be tested for include marijuana, cocaine, opiates, amphetamines, and phencyclidine (PCP).

An initial drug screen will be conducted on each urine specimen. For those specimens that are not negative, a confirmatory Gas Chromatography/Mass Spectrometry (GC/MS) test will be performed. The test will be considered positive if the amounts present are above the minimum thresholds established in 49 CFR Part 40, as amended.

The screening and confirmation cutoff limits are expressed in nanograms per milliliter (ng/mL):

Initial test analyte	Initial test cutoff concentration	Confirmatory test analyte	Confirmatory test cutoff concentration
Marijuana metabolites	50 ng/mL	THCA	15 ng/mL.
Cocaine metabolites	150 ng/mL	Benzoylcegonine	100 ng/mL.
Opiate metabolites			
Codeine/Morphine	2000 ng/mL	Codeine	2000 ng/mL.
		Morphine	2000 ng/mL.
6-Acetylmorphine	10 ng/mL	6-Acetylmorphine	10 ng/mL.
Phencyclidine	25 ng/mL	Phencyclidine	25 ng/mL.
Amphetamines			
AMP/MAMP	500 ng/mL	Amphetamine	250 ng/mL.
		Methamphetamine	250 ng/mL.
MDMA			
	500 ng/mL	MDMA	250 ng/mL.
		MDA	250 ng/mL.
		MDEA	250 ng/mL.

In instances where there is reasonable suspicion that an employee is abusing a substance other than the five drugs listed above, Intercity Transit reserves the right to test (non-DOT) for additional drugs under Intercity Transit's own authority using standard laboratory testing protocols.

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### **6.4 TESTING FOR ALCOHOL**

Tests for breath alcohol concentration will be conducted utilizing a National Highway Traffic Safety Administration (NHTSA)-approved Evidential Breath Testing device (EBT) operated by a trained Breath Alcohol Technician (BAT). Alcohol screening tests may be performed using a non-evidential testing device (Alcohol Screening Device (ASD)) which is also approved by NHSTA. Both the EBT and the ASD used will be listed on the conforming products list (CPL). If the initial test indicates an alcohol concentration of 0.02 or greater, a second test will be performed to confirm the results of the initial test. The confirmatory test must occur on an EBT. The confirmatory test will be conducted at least fifteen minutes after the completion of the initial test. The confirmatory test will be performed using a NHSTA-approved EBT operated by a trained BAT.

A safety-sensitive or non-safety-sensitive employee who has a confirmed alcohol concentration of 0.02 or greater but less than 0.04 will be removed from their position for a minimum of 24 hours and considered in violation of this policy and subject to discipline as outlined in section 5.4 of this policy.

An alcohol concentration of 0.04 or greater will be considered a positive alcohol test and in violation of this policy and a violation of the requirements set forth in 49 CFR part 655 for safety-sensitive employees.

Any safety-sensitive employee with a confirmed positive drug or alcohol test, or non-safety-sensitive employee that has a ~~positive test~~ *policy violation*, will be removed from their position, informed of educational and rehabilitation programs available, and referred to a SAP, or a substance abuse counselor or the EAP for assessment. A positive and or a *policy violation* drug and/or alcohol test will also result in discipline up to and including discharge.

### **6.5 PRE-EMPLOYMENT TESTING/PRE-TRANSFER**

All safety-sensitive position applicants shall undergo urine drug testing immediately following the offer of employment, or transfer into a safety-sensitive position. Receipt by Intercity Transit of a negative drug test result is required before hire or in the case of transfers: prior to performing safety sensitive functions. If the pre-employment drug test is canceled, the applicant must retake the test with a negative test result prior to hire or transfer. A verified drug test result of anything other than negative will result in rescinding the conditional offer of employment by Intercity Transit. Employees seeking to

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transfer to a safety-sensitive position will be denied that transfer and if having tested positive or in violation of this policy will be subject to discipline as described in the Policy.

**A covered employee who has not performed safety-sensitive functions for 90 consecutive calendar days, and has been out of the employer's random testing pool, regardless of the reason, shall undergo pre-employment drug testing. The results must be verified negative before the covered employee performs a safety sensitive function.**

### 6.6 REASONABLE SUSPICION TESTING

All safety-sensitive and non-safety-sensitive employees may be subject to a fitness for duty evaluation, and urine and breath/saliva testing when there are reasons to believe they are not fit for duty ~~immediately prior to, during or immediately after performing job duties~~ just before, during, or just after performing safety sensitive or non-safety sensitive duties, or \*when on the transit property (\*under Employer authority/non-DOT testing). Reasonable suspicion referrals for testing will be made on the basis of documented objective facts and circumstances that are consistent with the short-term effects of substance abuse. Employees will be transported by Intercity Transit staff to the collection site and will be required to undergo alcohol and drug testing. Following the completion of the tests, employees will be placed on Administrative Leave with Pay and transported home pending Intercity Transits receipt of the result of the tests from the MRO.

Examples of reasonable suspicion include, but are not limited to, the following:

- Physical signs and symptoms consistent with prohibited substance use.
- Evidence of the manufacture, distribution, dispensing, possession, or use of controlled substances, drugs, alcohol, or other prohibited substances.
- Occurrence of a serious or potentially serious accident potentially caused by prohibited substance abuse or alcohol misuse.
- ~~Fights (meaning physical contact), assaults, and flagrant disregard or violations of established safety, security, or other operating procedures.~~

**Reasonable suspicion referrals must be made by a supervisor who is trained to detect the signs and symptoms of drug and alcohol use and who reasonably concludes that an employee may be adversely affected or impaired in their work performance due to possible prohibited substance misuse.**

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### **6.7 POST-ACCIDENT TESTING**

**All safety-sensitive and non-safety-sensitive employees will be required to undergo urine and breath/saliva testing if they are involved in an accident with any Intercity Transit vehicle (regardless of whether or not the safety-sensitive employee's vehicle is in revenue service or is operating a revenue service vehicle) that results in:**

- **a fatality (this includes all surviving safety-sensitive employees that are operating the vehicle and any other's whose performance could have contributed to the accident).**
- **injuries requiring immediate transportation to a medical treatment facility (unless, by the evidence available at the scene, the operator can be completely discounted as a contributing factor to the accident).**
- **one or more vehicles incur disabling damage that requires towing from the site (unless, by the evidence available at the scene, the operator can be completely discounted as a contributing factor to the accident).**

**Following an accident, the safety-sensitive and non-safety-sensitive employee will be tested as soon as possible, but not to exceed eight hours for alcohol testing and 32 hours for drug testing. An alcohol test will be administered within two hours of the accident. If not completed within two hours a report must be filed explaining why and attempts to obtain a specimen will continue. If no specimen has been obtained within eight hours of the accident, no test shall be given and the two-hour report will be updated with the reasons for the delay.**

**Any safety-sensitive or non-safety sensitive employee involved in an accident (FTA defined accident) must refrain from alcohol use for eight hours following the accident or until they undergo a post-accident alcohol test. The employee must remain readily available for post-accident drug and alcohol testing, including notifying Intercity Transit of his/her location if he/she leaves the scene of an accident prior to submission of these tests. Post-accident testing may be delayed while the employee assists in the resolution of the accident or receives medical attention following the accident.**

**Any safety-sensitive or non-safety-sensitive employee who leaves the scene of the accident without justifiable explanation prior to submission to drug and alcohol testing will be considered to have refused the test and their employment terminated.**



**Cancels: Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.**

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**Employees tested under this provision will include not only the operations personnel, but also any other covered employees whose performance could have contributed to the accident.**

### **6.8 RANDOM TESTING**

**Employees in safety-sensitive positions will be subject to random, unannounced testing with no discretion by management or operational persons. The selection of safety-sensitive employees for random drug and alcohol testing will be made using a scientifically valid method (a computer based random number generator) that ensures each covered employee that they will have an equal chance of being selected each time selections are made. The random tests will be unannounced and spread throughout the year and may occur at any time throughout the employee's workday. The random testing rate requirement for the Federal Transit Administration is to annually complete drug tests equivalent to 25% of the number of covered employees and complete alcohol tests equivalent to 10% of the number of covered employees. These percentage rates are subject to change by the direction of the FTA.**

**Employees selected for testing receive a Letter of Notification and will report immediately to the appropriate testing site. Alcohol testing will only occur while the employee is performing safety-sensitive function, just prior to performing such functions or just after an employee has completed performing such functions. Drug testing may occur at any time during the employee's work shift.**

**Non-safety-sensitive employees are not subject to random testing.**

### **6.9 SPLIT SAMPLE TESTING**

**The method of collecting, storing, and testing the split sample will be consistent with the procedures set forth in 49 CFR Part 40, as amended. A split specimen sample testing procedure is one in which the employee provides a minimum of 45 ml of urine, with 30 ml as the primary specimen and 15 ml as the secondary specimen, at the time of collection. The first specimen is tested at the laboratory, and the second specimen bottle is stored for later testing should the first specimen test positive. Upon notice of a positive test on the first specimen bottle, the employee may request within 72 hours that the second specimen bottle be tested. The Medical Review Officer will authorize the testing of the split specimen. Split-specimen testing is not allowed on an invalid**

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**result. The test must be conducted on the split sample that was provided by the employee at the same time as the original sample. Testing of the split specimen is performed ONLY at a SAMHSA certified laboratory by using GC/MS confirmation.**

### **6.10 EMPLOYEE REQUEST FOR RE-TEST**

**Any safety-sensitive or non-safety-sensitive employee who questions the results of a required drug test under paragraphs 6.5 through 6.8 of this policy may request that an additional test be conducted. The test must be conducted on the split sample that was provided by the employee at the same time as the original sample. The employee's request for a split sample test must be made to the Medical Review Officer within 72 hours of notice of the original sample verified test result. Request after 72 hours will only be accepted if the delay was due to documentable facts that were beyond the control of the employee. All costs for such testing are paid by the employee unless the result of the split sample test invalidates the result of the original test. Re-tests however, will not be delayed due to an employee's inability to pay. The employer will pay for the test and arrange for the employee to reimburse the employer.**

### **6.11 RETURN TO DUTY TESTING**

**Intercity Transit does not offer a second chance policy; Return to Duty Testing is in this Policy to note Part 655 regulations and or Intercity Transit's requirements.**

**All safety-sensitive employees and non-safety sensitive employees who test positive on an alcohol test at levels 0.04 and greater or have a *policy violation* at levels 0.02 -0.039 must test negative for drugs and alcohol and be evaluated and released to duty by the SAP (for DOT Positive Test) or Substance Abuse Counselor or EAP provider (*for policy violations*) before returning to work. Return to duty drug tests will be conducted by direct observed collection.**

**Safety sensitive and non-safety sensitive employees who self-report may be subject to Return to Duty Testing per the Substance Abuse Counselor or EAP provider recommendations.**

**Cancels: Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.**

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### 6.12 FOLLOW UP TESTING

Intercity Transit does not offer a second chance policy; **Follow up Testing** is included to note **Part 655 regulations** and or Intercity Transit's requirements.

**All safety-sensitive employees and non-safety sensitive employees who test positive or on an alcohol test at levels 0.04 and greater or have a policy violation at levels 0.02 -0.039 will be required to undergo frequent unannounced random urine and/or breath/saliva testing following their return to duty. The follow-up testing will be performed for a period of one to five years based on the SAP's recommendations (for DOT Positive Tests) or Substance Abuse Counselor or EAP provider (for policy violations) recommendations, with a minimum of six tests to be performed during the first year. All follow-up drug testing will be conducted by direct observed collection.**

Safety sensitive and non-safety sensitive employees who self-report may be subject to follow up testing per the **Substance Abuse Counselor or EAP provider** recommendations.

### 7.0 AWARENESS, ASSISTANCE AND ASSESSMENT

Intercity Transit's Drug and Alcohol Testing Policy and Program include components for awareness, prevention and intervention. To promote a drug free workplace, Intercity Transit provides supervisory and employee education and training, and EAP and SAP (or **Substance Abuse Counselor**) services. Intercity Transit's Drug and Alcohol Program Manager (DAPM) is responsible for providing continuing policy components.

#### 7.1 SUBSTANCE ABUSE/MISUSE AWARENESS

The human costs of substance misuse/abuse are devastating to society, the workplace, the family, and individuals. Two-thirds of all homicides are committed by people who used drugs or alcohol prior to the crime. Two-thirds of all Americans will be involved in an alcohol-related accident during their lifetimes.

The medical costs of illness related to substance misuse/abuse are staggering. Each year 30,000 people die due to alcohol-caused liver disease. Another 10,000 die due to alcohol-induced brain disease or suicide. Listed below are some symptoms of substance abuse problems.

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- ♦ Difficulty in concentration
- ♦ Tardiness
- ♦ Absenteeism
- ♦ Excessive sick leave
- ♦ Lowered job efficiency
- ♦ Extreme changes in personality
- ♦ Overreaction to real or imagined criticism
- ♦ Subject of complaints from customers, coworkers or supervisors
- ♦ Avoidance of associates
- ♦ Alcohol odor on breath
- ♦ Leaving work early
- ♦ Accidents on the job
- ♦ Confusion
- ♦ Interrupted or change in sleeping patterns

Besides the costs described above, substance-abusing employees create business costs and legal liabilities for their employers, such as additional health care benefits claimed by substance abusers, negative impacts on employee morale, or possible potential "liabilities" such as a lawsuit filed by an injured party after an accident caused by substance-abusing employee.

### **7.2 EMPLOYEE ASSISTANCE PROGRAM (EAP)/ Rehabilitation Alternatives**

Intercity Transit encourages employees to voluntarily seek treatment and provides an Employee Assistance Program (EAP). Intercity Transit supports employees who volunteer for treatment of alcohol or drug abuse. Employees who suspect they may have alcohol or substance abuse problems are encouraged to utilize the EAP resources before the problem affect their employment status. Participation in this program is voluntary and confidential. Alcoholism and drug dependence are treatable illnesses and can be successfully dealt with if referred to an appropriate source for treatment.

Employees who choose to notify the DAPM of alcohol and or substance abuse or misuse problems will receive the same assistance extended to employees with other illness. In the event the employer receives notification by an employee of possible problems, use, abuse or misuse, the employee may be required by the employer to undergo drug and or alcohol testing and or be referred to a SAP (or Substance Abuse Counselor or EAP) for assistance to provide the employer with notice that the employee is safe to return to the workforce. Employees may use sick and vacation leave for treatment and rehabilitation. Employees may also use leave of absence without pay, subject to the approval of the Human Resources Department. The cost of any treatment or rehabilitation services is the responsibility of the employee or their insurance provider.

Intercity Transit encourages employees to contact the Human Resources Department for help in understanding benefits and leave policies when participating in the EAP. Any decision to seek help through the EAP, with a SAP (or Substance Abuse Counselor or EAP)

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or privately, will not interfere with an employee's continued employment or eligibility for promotional opportunities. However, employees may be required to adhere to Section 8.0 - Re-Entry Contracts based on the recommendations of the SAP (or Substance Abuse Counselor or EAP) which includes Return to Duty Testing and Follow-up Testing and adherence to any aftercare requirements.

While Intercity Transit is eager to assist employees with alcohol or drug dependency problems, Intercity Transit expects employees to remember that safety is the Agency's first priority. Therefore, employees must not report for work or continue working if they are not fit for duty. Failure to observe the rules established in this policy will result in disciplinary action regardless of whether or not an employee is participating in a treatment program. Intercity Transit expects such employees to observe all other required job performance standards and work rules, including attendance.

### **7.3 SUBSTANCE ABUSE PROFESSIONAL (SAP)**

**Any safety-sensitive or non-safety-sensitive employee who tests positive for the presence of illegal drugs or alcohol above the minimum thresholds set forth in 49 CFR Part 40, as amended, will be referred for evaluation by a SAP. A SAP is a licensed physician (Doctor of Medicine or Osteopathy); or a licensed or certified social worker; or a licensed or certified psychologist; or a licensed or certified employee assistance professional; or a state-licensed or certified marriage and family therapist; or an alcohol and drug abuse counselor certified by NAADAC, or by ICRC, or by the National Board of Certified Counselors, Inc. and Affiliates/Master Addictions. The SAP will evaluate each employee to determine what assistance the employee needs in resolving problems associated with prohibited drug use or alcohol misuse.**

**If a safety-sensitive or non-safety-sensitive employee (includes self-reports) is allowed to return-to-duty, they must properly follow the rehabilitation program prescribed by the SAP. The employee must have a negative return-to-duty drug and alcohol test, met all aftercare requirements recommended by the SAP, and be subject to unannounced follow-up tests for a period of one to five years. The cost of the SAP, (or Substance Abuse Counselor or EAP) treatment and or rehabilitation services is the responsibility of the employee and or their insurance provider. Intercity Transit will allow employees to take accumulated sick leave, vacation leave or FMLA to participate in the prescribed rehabilitation program. Employees may also use leave of absence without pay, subject to the approval of the Human Resources Department.**

**Cancels: Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.**

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### **8.0 RE-ENTRY CONTRACTS**

Intercity Transit has a zero tolerance policy therefore Intercity Transit does not offer a second chance policy; Re-Entry Contract language is included to note Part 655 regulations and or Intercity Transit's requirements.

In the event an employee is returned to work after a violation of this policy and termination of employment, the following section is required by FTA and Intercity Transit. Those employees who do re-enter the work force must agree and adhered to a re-entry contract. That contract may include, but is not limited to:

1. A release to work statement from the SAP (or Substance Abuse Counselor or EAP).
2. A negative test for drugs and/or alcohol.
3. An agreement to unannounced frequent follow-up testing for a period of one to five years based on the SAP's (or Substance Abuse Counselor or EAP) recommendations with at least six tests performed during the first year.
4. A statement of expected work-related behaviors.
5. An agreement to follow specified after care requirements with the understanding that violation of the re-entry contract is grounds for termination.

### **9.0 REPORTING TO DEPARTMENT OF LICENSING (DOL)**

Washington State's RCW 46.25 requires the reporting of positive drug and/or alcohol tests, attributed to CDL holders to the Department of Licensing (DOL). The Medical Review Officer and/or Breath Alcohol Technician is required to report all verified positive pre-employment test results to the DOL within three days. In addition the Drug and Alcohol Program Manager (DAPM) must report verified positive tests (random, post-accident, etc.) results upon termination of the CDL holder's employment or resignation and the conclusion of the grievance process, not including union arbitration. Upon receipt of the report DOL shall disqualify the CDL holder from operating a commercial motor vehicle. The DOL shall notify the CDL holder of the disqualification and of the opportunity to request a hearing via US mail.

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### **10.0 INQUIRIES FOR ALCOHOL AND CONTROLLED SUBSTANCES INFORMATION FROM PREVIOUS EMPLOYERS**

**As defined in 49 CFR Part 40, Intercity Transit is required to inquire about the following information on a covered employee/applicant during the preceding two years from his/her previous employers;**

- Alcohol tests with a result of 0.04 alcohol concentration or greater;
- Verified positive controlled substances test results; and
- Refusals to be tested (including verified adulterated or substituted drug test results).

Pursuant to the covered employee/applicant's written authorization, the "Request/Consent Form for the Release of Information from Previous Employers for DOT Alcohol and Controlled Substances Testing Information" form will be sent.

If the employee/applicant refuses to provide this written consent, or has tested positive or refused to test in the past 2 years and has not successfully completed the recommendations of a substance abuse professional Intercity Transit will not permit the employee to perform safety-sensitive functions and the offer of employment shall be withdrawn or employment with Intercity Transit will be terminated.

If feasible, the information must be obtained and reviewed by Intercity Transit prior to the first time a covered employee performs safety-sensitive functions for transit. If not feasible, the information must be obtained and reviewed as soon as possible, but not later than 30-calendar days after the first time a covered employee performs safety-sensitive functions.

Intercity Transit may not permit a covered employee to perform safety-sensitive functions after 30 days without having made a good faith effort to obtain the information as soon as possible.

### **11.0 CONFIDENTIALITY & RECORDKEEPING**

**Cancels: Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.**

## **POLICY-HR-3511**

Intercity Transit will carry out the policy in a manner that respects the confidentiality of those involved at all times. The laboratory and MRO shall maintain strict confidentiality of all test results in accordance with 49 CFR Part 40 and 49 CFR Part 655 of FTA regulations. The release of information, recordkeeping, and retention of records will comply with FTA regulations, 49 CFR Part 655. Testing records and results will be released only to those authorized by the FTA rules to receive such information. In addition, in accordance with Part 655, an employee, upon written request, can obtain copies of any of their drug and alcohol related records and receives them in a prompt manner.

**Drug and alcohol program records will be kept in secure location with controlled access and kept separate from personnel files.** The DAPM or Human Resources Director will receive the test results via phone, mail, secure voice mail, or other means as appropriate.

### 12.0 EDUCATION AND TRAINING

Intercity Transit will make training, education programs, and materials available to all agency employees. All employees will receive a minimum of ninety (90) minutes of training on the effects of drug and alcohol on the body, the major elements of the testing regulations, information regarding use of prescription and over-the-counter medicines and Intercity Transit's Drug and Alcohol Testing Policy and Program. **Supervisory level staff will receive a minimum of one-hundred twenty (120) minutes of training and instruction on how to identify the signs of drug and/or alcohol use or impairment and what to do in reasonable suspicion cases. Training will include the physical behavioral, speech and performance indicators of probable drug use and alcohol misuse.**

### 13.0 MODIFICATIONS

The General Manager, or his designee, after concurrence by the Authority Chairperson, is authorized to implement interim changes to the Intercity Transit Drug and Alcohol Testing Policy and Program he/she deems necessary to carry out the provision of regulations issued pursuant to the Omnibus Transportation Employee Testing Act of 1991 and to enact such additional policies and procedures as may be necessary to insure Intercity Transit's compliance with state and federal law affecting drug and alcohol matters. These changes shall be subject to review and approval by the full Transit Authority at the next regularly scheduled Authority meeting following such interim changes.

### 14.0 PROGRAM CONTACTS



Cancels: Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.

## **POLICY-HR-3511**

Any questions regarding this policy or any other aspect of the drug and alcohol-free transit program may be addressed to the Agency DAPM listed in Appendix A of this policy. A copy of this policy, program information and DOT FTA regulations (Part 40 and Part 655) is available in the Human Resources Department and on our shared directory.

**APPENDIX A -- LIST OF PROGRAM CONTACTS**

**APPENDIX B -- LIST OF SAFETY SENSITIVE POSITIONS**

**Cancels:** Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.

## POLICY-HR-3511

### APPENDIX A

#### PROGRAM INFORMATION CONTACTS -

<p><b><u>Drug and Alcohol Program Manager (DAPM)</u></b></p> <p><b>Intercity Transit</b>                  Human Resources Department                  Christine DiRito, Senior Human Resources Analyst                  PO Box 659/526 Pattison SE                  Olympia WA 98507                  p 360-705-5865 f 360-754-6845</p>	
<p><b><u>Medical Review Officer</u></b></p> <p><del>Kirby Griffin, MD</del>  <del>9370 SW Greenburg RD S</del>  <del>Portland OR 97223</del>  <del>877-977-3225</del></p>	<p><b><u>Dr. Dee McGonigle, MD</u></b>                  Drug Free Business MRO                  Services                  18912 North Creek                  Parkway, Suite 202                  Bothell, WA 98011                  (866) 448-0657                  change/rev. 1/2017</p> <p><b><u>Substance Abuse Professionals</u></b></p> <p>Magellan Behavioral Health                  (will give referral to a qualified SAP)                  1-800-523-5668  <a href="http://www.MagellanHealth.com">www.MagellanHealth.com</a></p>
<p><b><u>Employee Assistance Program</u></b></p> <p>Magellan Behavioral Health                  1-800-523-5668  <a href="http://www.MagellanHealth.com">www.MagellanHealth.com</a></p>	<p><b><u>DHHS Certified Laboratory</u></b></p> <p>PAML                  PO Box 2687, 110 W. Cliff Ave                  Spokane WA 99204                  1-877-778-9590</p>
<p>TPA Services through the AWC Testing Consortium                  Provider: A WorkSAFE Service Inc.                  Salem OR                  1-503-391-9363</p>	


#### Collection Site Locations

<p>West Care Clinic                  3000 Limited Lane                  Olympia WA 98502                  360-357-9392                  Hours: 8AM -8PM M-F; 9-5 SA-SUN</p>	<p><b>AFTER HOURS TESTING ONLY</b>                  St. Clare's Hospital - Emergency Entrance                  11315 Bridgeport Way S.W.                  Lakewood, WA 98499                  253-985-2859                  Hours: 8PM -8AM M-F; 5PM-9AM SA-SUN</p>
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**Cancels:** Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.

## POLICY-HR-3511



 <h3 style="display: inline-block; margin-left: 20px;">Community Hotlines &amp; Resource Information</h3>	
Alcohol Abuse 24-Hour Helpline 1--866-643-6144 Drug Abuse 24-Hour Helpline 1--888-895-2719	<b>24 Hour Help-lines for Drug and Alcohol Abuse:</b> provides referrals, information, other crisis centers and hotline numbers nationwide: <b>National Hotline 1-800-662-4357</b>
Alcoholics Anonymous (A.A.) 352-7344 Narcotics Anonymous (N.A.) 754-4433 Al-anon 352-7745	Substance Abuse and Mental Health Services Administration (SAMHSA): <a href="http://www.samhsa.gov">www.samhsa.gov</a>
Partnership for Drug Free America: <a href="http://www.drugfree.org">www.drugfree.org</a>	Internet Prescription Drug lists: <a href="http://www.rx.list.com">www.rx.list.com</a>
National Institute on Drug Abuse (NIDA) <a href="http://www.drugabuse.gov">www.drugabuse.gov</a>	National Institute on Mental Health (NIMH) <a href="http://www.nimh.nih.gov">www.nimh.nih.gov</a>
Providence St. Peter Hospital Chemical Dependency 456-7575	Community Crisis Clinic and Information & Referral Line 586-2800

In the Community:  
 South Sound Mental Health Services 754-7576  
 Behavioral Health Resources 704-7170

Cancels: Personnel Policy Manual Dated 1991, Section 11.18; Repeals Resolutions 04-2002, dated April 3, 2002; Resolution 06-99, dated August 4, 1999, and Resolution 01-99, dated March 3, 1999. Rescinds initial policy dated 1/96 and subsequent revisions dated 6/96; 2/99; 7/99; 9/01; and 4/02; Policy-HR-3511 dated September 3, 2008; Policy HR-3511 dated November 4, 2009, December 1, 2010 and July 2, 2014.

## POLICY-HR-3511

### APPENDIX B

#### SAFETY SENSITIVE POSITIONS

##### POSITIONS -

Transit Operators / Coach & Van	(RVO)
Director of Operations	(RVO)
Operations Supervisors	(RVC/D)
Fixed Route Manager	(RVC/D)
DAL Dispatch Specialists	(RVC/D)
ADA Coordinator	(RVC/D)
DAL Manager	(RVC/D)
Maintenance Manager	(RVO)
Mechanics/Technicians	(RVM)
Support Specialists	(RVM)
Service Workers	(RVM)
Vehicle Cleaners	(RVO)
Maintenance Supervisors	(RVM)

RVO = Revenue Vehicle Operation  
RVC/D = Revenue Vehicle Control/Dispatch  
RVM = Revenue Vehicle Maintenance

**AGREEMENT**

**Between**

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**INTERCITY TRANSIT  
of  
OLYMPIA, WASHINGTON**

**and**

**INTERNATIONAL ASSOCIATION  
of  
MACHINISTS AND AEROSPACE WORKERS  
DISTRICT LODGE 160**

**for the period**

**January 1, 2014 through December 31, 2016**

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## AGREEMENT

This Agreement is made by and between Intercity Transit of Olympia, Washington, or any successors or assignees thereof, and the International Association of Machinists and Aerospace Workers, AFL-CIO, District Lodge No. 160, representing employees of the Employer as described in Article I of this Agreement.

The Employer and the Union agree that they will administer this Agreement in accordance with the true intent of its terms and provisions and will give each other fullest cooperation to the end that harmonious relations may be maintained in the interest of both the Employer and the Union.

The waiver of any breach or condition of this Agreement by either party shall not constitute a precedent for any further waiver of such breach or condition.

It is understood that the term "employee" as used in this Agreement includes both male and female employees covered by this Agreement. In addition, the term "days" as used in this Agreement shall be defined as calendar days.

## **ARTICLE 1 - RECOGNITION OF BARGAINING UNIT**

Intercity Transit of Olympia, Washington (hereinafter referred to as the "Employer") recognizes the International Association of Machinists and Aerospace Workers, AFL-CIO, District Lodge No. 160 (hereinafter referred to as the "Union") as the exclusive collective bargaining agent for all full-time and regular part-time Technicians, Service Workers, Support Specialists, Vehicle Cleaners, and Cleaners.

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## **ARTICLE 2 - RIGHTS OF MANAGEMENT**

The management and the direction of the working force, including the right to hire, classify, assign, promote, demote, suspend or discharge for proper cause; to transfer; to relieve employees from duty because of lack of work, or for other legitimate reasons, is vested exclusively in the Employer subject to all the provisions of this Agreement.

All matters not specifically and expressly covered or treated by the language of this Agreement may be administered by the Employer in accordance with such policies or procedures as the Employer from time to time may determine.

The Employer shall have the right to establish rules and regulations as may be deemed necessary by the Employer for the management of the affairs of the Employer, and the Union agrees that the employees shall be bound by and obey such rules and regulations insofar as the same does not conflict with the terms of this Agreement.

Rules and regulations shall be made available in writing to all employees.

## **ARTICLE 3 - JOINT LABOR-MANAGEMENT COMMITTEE**

A labor-management committee shall be established, which shall meet on a monthly basis to communicate and resolve issues of mutual interest in areas including, but not necessarily limited to: general operational issues as raised by either party; health and welfare concerns; apprenticeship program; and safety.

The committee shall consist of the Business Representative, the shop steward from each shift, one Union member-at-large, a Maintenance Supervisor, the Maintenance Director, the Human Resources Director, and the General Manager. By mutual agreement, other persons may be invited to participate from time to time in order to provide input on specific issues.

## ARTICLE 4 - NON-BARGAINING UNIT EMPLOYEES

Non-bargaining unit employees shall not take the place of a bargaining unit employee, and it is agreed that these employees will not use tools of the trade except:

- (1) when used for purposes of instruction;
- (2) in cases of emergency which are beyond the control of the Employer, or
- (3) if a bargaining unit employee is on a authorized leave of absence (i.e. medical, military, jury duty) for longer than fourteen (14) days.

To fulfill the need listed in 3 above, the Employer will review internal bargaining unit employee availability prior to requesting assistance from non-bargaining unit employees or from an outside temporary agency. Such non-bargaining unit employees shall not substitute for a worker in the event it deprives an individual of a job. This applies to the regular shift and overtime conditions.

- (4) In the event any opening occurs which will last more than thirty (30) days but less than ninety (90) days the Employer may bring in temporary workers provided: there are no bargaining unit members willing and qualified to do the work; any bargaining unit member within classification will have the ability to take the more preferential shift; overtime will be offered to bargaining unit members first, prior to the beginning of each thirty day block. Should the need extend beyond ninety (90) days the Employer and Union shall meet to determine the possible continuation of the situation.

## **ARTICLE 5 - EMPLOYEE EVALUATIONS**

Intercity Transit reserves the right to evaluate employees' work performance. Employees shall be presented a copy of their evaluation at a private conference with their immediate Supervisor. If an employee is dissatisfied with their evaluation, the employee may request and shall be granted an evaluation review with the Department Director, the evaluation supervisor and the Union Steward present. The Evaluation Review will allow an employee to present their disagreement with the evaluation. The employee may attach a written response to the evaluation within seven (7) days of the evaluation. The Department Director shall render a decision of determination of the review and the decision shall be final.

## **ARTICLE 6 - STRIKES OR LOCKOUT**

During the term of this Agreement, neither the Union nor any employee shall cause, engage in, sanction, encourage, direct, request or assist in a slowdown, work stoppage, interruption of work, strike of any kind, including a sympathy strike, against the Employer. The Union and its representatives will undertake every reasonable measure to prevent and/or terminate all such strikes, slowdowns or stoppage of work. The Employer may discipline or discharge any employee who violates this Article. Discipline or discharge for violation of this Article may be processed through the grievance and arbitration procedure. This remedy shall not be exclusive of any other remedy available to the Employer. During the term of this Agreement, the Employer shall not cause, permit or engage in any lockout of its employees.



## ARTICLE 7 - UNION MEMBERSHIP AND DUES

**Section 7.1** It shall be a condition of employment that all employees of the Employer covered by this Agreement and those employees hired on or after its execution date shall, on the thirtieth (30th) day following the beginning of such employment, become and remain members of the Union, provided that objections to joining the Union which are based on bona fide religious tenets or teachings of a church or religious body of which such employee is a member will be observed. Any such employee shall pay a service charge equivalent to regular Union dues and initiation fees to a non-religious charity or to another charitable organization mutually agreed upon by the employee affected and the bargaining representative for which such employee shall furnish written proof to the Union that such payment has been made. If the employee and the bargaining representative do not reach agreement on such matter, the Public Employment Relations Commission shall designate the charitable organization.

**Section 7.2** The Union agrees that membership in the Union will not be denied or terminated for any reason other than the failure of an employee covered by this Agreement to tender the periodic dues and initiation fees uniformly required as a condition of acquiring membership in the Union. The parties also agree that when an employee fails to fulfill the above obligation, the Union shall provide the employee and the Employer with thirty (30) days notification of the Union's intent to initiate discharge action. During this period, the employee may make restitution in the amount which is overdue.

**Section 7.3** The Union agrees that the Employer shall not terminate the employment of any employee under the provisions of this Article until written notification is received from the Union that an employee has failed to pay the required dues or service charge or provide proof of an alternative payment based on religious tenets as provided herein above.

**Section 7.4** The Employer agrees to deduct from the paycheck of each employee who has so authorized it, the regular monthly dues. The amounts deducted shall be transmitted monthly to the Union on behalf of the employees involved. Authorization by the employee shall be on a standard form approved by the Employer and may be revoked by the employee upon request and the Union so notified.

**Section 7.5** The Union shall indemnify and hold the Employer harmless against any and all claims, suits, orders or judgments brought or issued against the Employer as a result of any action taken or not taken by the Employer under the provisions of this Article.

## ARTICLE 8 - BUSINESS REPRESENTATIVES AND UNION ACTIVITY

**Section 8.1** Business Representative Access to Work Site and/or Employees. The Business Representative or other full-time representatives of the Union shall be admitted to the facility by the Employer or allowed to talk to employees during working hours, provided advance notification is provided to the Employer and such visitation does not interfere with normal operations. All such representatives shall comply with the security regulations as required of all other visitors.

**Section 8.2** Union Steward. The Union shall designate one employee per shift as Union Steward and one alternate per shift to investigate complaints or claims of grievance on the part of the employees or the Union. Investigations will not interfere with the normal business of the Employer. Stewards will strive to minimize normal work time spent on complaints or grievances and will inform the Employer if these activities require leaving their work area. If these activities require more than 30 minutes in a day, the Union Steward will meet with the Employer and seek mutual agreement as to the time necessary for these activities.

The Union will inform the Employer in writing when a change in Union Steward or alternates takes place.

**Section 8.3** Union Bulletin Boards. The Employer shall provide one bulletin board for the Union's exclusive use. The bulletin board is for the posting of rules, regulations, notices of meetings and other business affairs of the Union. It shall be the responsibility of the Union and its representatives to assure that information posted on such board is "Union Business".

**Section 8.4** Union Activity. No employee shall be discharged or discriminated against in any way because of their membership or participation in sanctioned activities in behalf of the Union.

**Section 8.5** Union Leave. Employees accepting full-time positions as elected or appointed representatives shall be granted leaves of absence without pay for the term of office or any renewal thereof without loss of seniority rights and with the privilege of returning to their former classification.

Employees may also be granted short-term leaves of absence without pay for the purpose of attending Union conventions, meetings, contract negotiations and any other bona fide Union business. Requests for time off must be in writing, signed by the Business Representative, seven (7) days in advance of the time off and addressed to the Director of Maintenance except in emergency situations, in which event such advance notice shall be given no less than forty-eight (48) hours in advance.

## ARTICLE 9 - INFORMATION TO BE FURNISHED TO THE UNION

**Section 9.1** Memo Posting. Copies of all memos posted will be provided to the designated shop steward at his/her request.

**Section 9.2** Employment/Classification. The Employer agrees to make available to the Union with the following information:

- a. A list of members and any new members.
- b. Classification of employees.
- c. Rate of pay of employees.
- d. Seniority date.
- e. Employees loss of seniority for any reason.
- f. Job descriptions (if new or revised).
- g. Human Resources Rules and agency policies.

**Section 9.3** Reduction in Work Force. In case of a reduction in work force, the Employer agrees to provide the Union with the following information:

- a. A copy of the list of employees used by the Employer in applying such layoff.
- b. The names of employees on file for recall.
- c. The names and dates employees accept or decline recall offers.

## **ARTICLE 10 - NON-DISCRIMINATION**

It is mutually agreed that there shall be no discrimination because of race, color, religion, sex, age, marital status, national origin or physical, mental or sensory disabilities, Vietnam era or special disabled veteran status, discrimination pursuant to the Americans with Disabilities Act or other basis prohibited by State or Federal law. The Union and Employer representatives shall work cooperatively to assure the achievement of equal employment opportunity. Furthermore, employees who feel they have been discriminated against shall be encouraged to use the grievance procedure set up under this Agreement prior to seeking relief through other channels.

## ARTICLE 11 - DISCHARGE AND DISCIPLINE

**Section 11.1** No employee shall be discharged, suspended or otherwise disciplined without just and sufficient cause.

**Section 11.2** Oral Warning. When an oral warning occurs a record of the warning will be made and a copy given to the employee. No record of the oral warning will be placed in the employee's personnel file.

**Section 11.3** Written Warning. Written warnings may be given to the employee for infraction of the rules and regulations. The employee shall sign the written warning only to acknowledge receipt, not admit guilt, and state any objections to such warning in writing on the form provided. A copy of the written warning shall be placed within the employee's personnel file and will not be considered for disciplinary action beyond one (1) year from date of the warning, provided there is not additional disciplinary action within the year. If the employee is absent from work for a period greater than thirty (30) days, the one (1) year period shall be extended in proportion to the amount of time the employee remained absent from work.

**Section 11.4** In all cases of discharge, demotion or other discipline, the employee involved shall be notified, in writing, of the action and the reason for such action. Whenever possible, such notification shall be in advance of the discharge, demotion or other disciplinary action.

An employee shall have the right to have a Union Steward present at formal disciplinary action.

**Section 11.5** Should there be any dispute between the Employer and the Union concerning the existence of just and sufficient cause for discharge, suspension, demotion or discipline resulting in loss of compensation or benefits, such dispute shall be adjusted in accordance with Grievance and Arbitration provisions in this Agreement. Written warnings may be appealed through the first two (2) steps of the Grievance Procedure only. The findings of the General Manager shall be attached to the written warning. If the parties fail to agree, the written warning will stand. The Union may attach a statement of their position to the written warning.

**Section 11.6** In the event it is found that an employee has been discharged without just and sufficient cause, such employee shall be reinstated to the employee's former position. In no way shall the period of unjust discharge affect the employee's seniority rights or the employee's rights to the other benefits agreed to herein.

**Section 11.7** No camera video or audio recording shall be used by any manager against any IAM member for the purpose of finding misconduct or issuing discipline (fishing or targeted surveillance), except when there is an initiating event such as a complaint, accident, incident, or the Employer is made aware of an infraction. If discipline is issued, management and the Union Business Representative, or designee, may jointly review and discuss the recording.

## ARTICLE 12 - GRIEVANCE PROCEDURE

**Section 12.1** The purpose of this procedure is to provide an orderly, effective, and expeditious method for resolving grievances. A determined effort shall be made to settle any such differences at the lowest possible level in the grievance procedure. However, it is understood that failure of the parties to come to an agreement shall not be looked at disparagingly nor should it have a negative impact on the effectiveness of this procedure. It is further understood that there shall be no suspension of work, slowdown or curtailment of services while any grievance is in the process of adjustment or arbitration pursuant to the terms of this Agreement.

**Section 12.2** A "grievance", as used in this Agreement, shall be defined as a claim by an employee that the terms of this Agreement have been violated, or that a dispute exists concerning proper application or interpretation of this Agreement. Grievances shall be processed in accordance with the following procedures within the stated time limits.

**Section 12.3** Prior to filing a grievance an attempt should be made to settle the dispute by discussing the matter with the immediate supervisor or other appropriate management personnel.

**Section 12.4** Steps in the grievance procedure for disputes involving contract interpretation or disciplinary action shall be handled in the following manner:

### Step 1: Formal Grievance – Department Director

Grievances must be filed within fifteen (15) days of the occurrence of the event which gives rise to the grievance, or within fifteen (15) days of when the employee is informed of the event, by the individual affected or through their Shop Steward, to the employee's department director, or the director's designee.

The employee's department director, or the director's designee, shall attempt to satisfactorily settle the grievance within ten (10) days from the date of receipt of the employee's Step 1 grievance. Step 1 will include the following:

- a. A statement of the grievance and the facts upon which it is based, including the date of the occurrence and any relevant witnesses.
- b. The Articles or Section in this Agreement claimed to have been violated.
- c. Remedy sought.
- d. The signature of the aggrieved employee(s) and the Union representative (if presenting the grievance).
- e. Date of signatures/presentation.

## STEP 2: General Manager

In the event the grievance cannot be settled at the Step 1 level as defined above, it shall be submitted in writing within ten (10) days from the date of the department director's, or the director's designee's, Step 1 reply, by the Shop Steward to the Employer's General Manager and the Business Representative of the Union.

The written submission of a Step 2 grievance shall include the reasons for dissatisfaction with the department director's, or the director's designee's, solution.

The Employer's General Manager shall meet with the grievant, the Shop Steward, and the Business Representative of the Union within fifteen (15) days from the date of receipt of the Step 2 grievance, to attempt to satisfactorily settle the grievance. The General Manager will give a written response within seven (7) days of the meeting. If the Union is not in agreement with the written decision of the General Manager, the General Manager and the Business Representative of the Union will decide whether to submit the grievance to mediation or normal arbitration.

In the event the grievance is submitted to mediation and the recommendations of the mediator are not acceptable to either party, either party may request arbitration in accordance with Step 3 as defined below.

## Step 3: Arbitration

Within seven (7) days of the Step 2 response or the mediation decision, the Union may on behalf of the grievant serve a demand for arbitration upon the other party. Within seven (7) days of the demand, the parties shall jointly submit a request to the Federal Mediation and Conciliation Service for a list of seven (7) names from which the parties shall select their arbitrator. Within seven (7) days after receiving such list, the parties shall each alternately strike one name from the list, with the first strike being determined by the toss of a coin, until one name remains. The person thereafter remaining on the list shall be and become the arbitrator.

The parties will strive to schedule the earliest available dates for the arbitration hearing. Prior to commencement of the hearing, both parties shall stipulate to the issue(s) that will be presented for the arbitrator's consideration.

The arbitrator shall not add to, subtract from or in any way modify or change any of the terms or provisions of this Agreement nor shall the arbitrator have jurisdiction or authority to consider or decide matters concerning or involving a new or different agreement or requested changes in this Agreement.

The decision of the arbitrator shall become final and binding on both parties when delivered to them in writing.

The costs of the arbitrator and any other joint expenses shall be borne by the party whose position is not upheld by the arbitrator's decision. In the case of a compromise decision, the arbitrator shall decide on the distribution of fees.

**Section 12.5** The time limits may be extended by mutual agreement of the parties. In the absence of an agreed upon extension of the time limits the following sanctions shall apply:

- a. If the moving party fails to follow the time frame in progressing to the next step, the issue is forfeited.
- b. If the responding party fails to follow the time frame in responding to the moving party, the moving party has the option to move to the next step. "No response" shall be the same as "denying the grievance". Thus, the moving party must so notify the responding party of this action when taken and said notification must conform within the time limits set forth for progressing to the next step.

**Section 12.6** The aggrieved employee and/or the shop steward shall be given full opportunity to investigate the grievance. Should the grievance proceed to Step 3 (Arbitration), each party will bear the salary costs of their own witnesses as follows:

- a. Employees participating in the preparation and conduct of an arbitration at the request of the Union will be paid through IT's regular payroll process for such attendance; IAM will reimburse IT for wages and 401(k) Employer contributions related to such attendance.
- b. IT will submit a monthly billing to IAM for reimbursements due to IT; billing to be itemized based on hours in attendance, wages, deferred contributions.
- c. The billing rate will be based on an employee's straight time wage rate.
- d. Employer contributions will be included in the billing rate; all other benefits such as accrual of vacation and sick leave, health, PERS, Medicare, and so on shall not be billed/reimbursed by the Union.

**Section 12.7** Access to the Grievance Procedure. Notwithstanding the above terminology, either an employee or management shall have the opportunity to access this grievance procedure.

**Section 12.8** In all cases, the grievant shall receive notification of the outcome of the employee's grievance. Should it become necessary for a broader publication of the resolution outcome, the parties agree to jointly release such publication, as appropriate.

**Section 12.9** It is understood by the parties that confidentiality as to the specific facts and its processing must be maintained, and that any breach of confidentiality may jeopardize the effectiveness of this grievance procedure.



## **ARTICLE 13 - ALTERATION OF AGREEMENT**

No agreement, alteration, understanding, variation, waiver or modification of any of the terms, conditions or covenants contained herein shall be made by any employee or group of employees with the Employer, and in no case shall it be binding upon the parties hereto unless such agreement is made and executed in writing between the parties hereto.

The waiver of any breach or condition of this Agreement by either party shall not constitute a precedent in the future enforcement of all the terms and conditions herein.

## ARTICLE 14 - SAFETY

**Section 14.1** Mutual Objective. It is the mutual objective of both parties of this Agreement to maintain high standards of safety in order to eliminate as far as possible industrial accidents, illness and injuries. All employees are required to report observed safety hazards and concerns immediately to their supervisor.

**Section 14.2** Safety Committee. A member of the bargaining unit will be elected to the Employer's Safety Committee. The Safety Committee shall meet once every month and Safety Committee meetings shall be conducted on Employer's paid time. The duties of the Safety Committee will be to advise on matters relating to employee safety, review applicable safety laws and regulations, and make recommendations for maintenance of proper safety standards. Minutes of the meetings will be taken. Copies of the minutes will be posted on the Safety Board and on the shared directory. Maintenance Department will be notified as soon as possible in order to allow one bargaining unit member to accompany OSHA and WISHA on any walk-around inspection.

**Section 14.3** Safety Training and Equipment. The Employer will provide safety training to all employees and furnish safety and personal protective equipment for all employees. It shall be mandatory for all employees to participate in any required safety training provided by the Employer and use safety and personal protective equipment when the Employer determines they are necessary.

**Section 14.4** First Aid. The Employer shall establish and maintain an ongoing employee emergency first aid training program. At least one (1) employee per shift shall be required to maintain a valid first aid and CPR certificate.

## ARTICLE 15 - REQUIREMENT OF MEDICAL EXAMINATION

It is understood by the Employer and the Union that physical examinations or tests conducted by the physician of the Employer's choice shall be required during the term of this Agreement. Safety and health of the employees and customers of Intercity Transit necessitate these requirements.

**Section 15.1** Cost of Exams. The Employer shall pay the full cost for these medical or eye examinations if required. The Employer shall pay for any lost time associated with undergoing such medical examination. Employees shall receive copies of all medical reports from such required examinations.

**Section 15.2** Employer Required Exams. Employer-required exams include drug and alcohol testing (random, post-accident, reasonable suspicion, and return to work agreements) and medical exams required by the Employer to determine if an employee can safely fulfill their job duties. Examinations which are *not* considered to be Employer-required include any physician report that is required as a condition of returning to work after a medical leave.

**Section 15.3** Return to Work Exam. An employee returning to work following an injury that reduces their mobility when they return to work must provide a doctor's certification to return to work. The Employer may require a further examination to determine if the employee can safely fulfill their job duties. The Employer will pay any lost time and the cost of this required exam.

**Section 15.4** Commercial Driver's License Examination. All Commercial Driver License (CDL) holders are required to undergo and successfully pass a State of Washington Department of Licensing physical examination every two (2) years throughout their employment. The employee may choose to use an Employer selected physician or may choose to use a personal physician for the required examination. Examinations are scheduled on the employee's own time. The employee must carry the medical examiner's certificate on his/her person at all times while driving a commercial vehicle.

Employer Physician: If the employee chooses the Employer selected physician the cost of the examination will be billed directly to and paid by the Employer. Employees using the Employer physician will provide Human Resources with a copy of the medical examiners certificate.

Employee Physician: If the employee chooses to use a personal physician, the employee must schedule his/her own examination. Employees using their own physician will provide Human Resources with an original copy of the completed physical examination, signed by their physician. The employee is eligible to receive reimbursement for the cost of the exam (to include any required co-pay for the office visit) provided the employee submits satisfactory evidence of the costs he/she incurred. The maximum allowed reimbursement will be up to the same amount the Employer would have paid if the employee chose to use the Employer's physician.

## ARTICLE 16- HOURS OF WORK

**Section 16.1** The parties recognize that under normal working conditions forty (40) hours equals a normal workweek. It may, however, be necessary to allow, by mutual consent, variations to the hours of work to allow for flexible scheduling.

Hours of Work. The normal work hours for Maintenance employees will be as scheduling dictates. Due to the nature of their work, certain Maintenance employees will have different schedules. Those schedules shall be determined by the Maintenance Director or designee. The Employer retains the right to establish and alter work schedules in accordance with the public transportation needs, demand, Employer policies, and all regulations and requirements specified in the United States Fair Labor Standards Act. The Employer's determination in such matters shall be conclusive.

**Section 16.2** An employee shall be deemed to be working in the following shift if the employee starts their shift within the following designated times. See Section 17.5 Shift Differential for rates of pay.

4:00 a.m.	to	11:59 a.m.	Days
12:00 p.m.	to	7:59 p.m.	Swing
8:00 p.m.	to	3:59 a.m.	Graveyard

Each shift shall include an unpaid thirty (30) minute lunch period. Upon approval of the Employer, variations of the shift to accommodate longer lunch periods may be permitted. Each employee shall be given a paid fifteen (15) minute rest period in each half of the shift to which the employee is assigned; the time of starting each such rest period to be designated by the Employer. Each employee who is assigned to work two (2) hours or more either before or after their scheduled shift shall be granted a fifteen (15) minute paid rest period at either the start or conclusion of their normal shift respectively.

## ARTICLE 17 - RATES OF PAY AND CLASSIFICATIONS

**Section 17.1** The classification and rates of pay of employees are set forth in Appendix A, attached hereto and made part of this Agreement.

Employees will receive their regular rate of pay for attendance at Employer required meetings and for attendance at Employer required or approved training sessions; provided however, no payment shall be made for "homework assignments" resulting from said training sessions.

The Employer will pay up-front registration and testing costs associated with ASE certification. The employee is required to submit a copy of the certification of completion to the Employer within thirty (30) days of receiving said notification. If the employee does not submit the required certificate, or if the employee fails any of the tests or does not take the tests, the employee will reimburse the Employer for the costs of the ASE tests including registration costs. Reimbursement will be made in the form of a personal check or will be deducted from the employee's paycheck, whichever the employee chooses. Payment must be made within 30 days of the employee's notification of his/her status. No employee will "lose time" while attending ASE tests. Testing outside the employee's regular scheduled shift will be done on the employee's own time.

**Section 17.2** Overtime. All hours worked in excess of forty (40) in the work week shall be compensated at a rate of one and one-half (1-1/2) times the straight time hourly rate, plus any differential. The employee may elect to receive their entitlement as pay or as compensatory time (comp time) subject to paragraph "m" below.

For purposes of this Section, the use of any paid leave when an employee is off duty relating to vacation, comp time, observed holidays (except on an employee's regularly scheduled day off), military duty, or jury duty will be counted as hours worked for overtime computation. The use of any paid leave relating to sick leave will not be counted as hours worked for overtime purposes; the payment of an observed holiday, if it falls on an employee's regularly scheduled day off, shall not be counted as hours worked for overtime purposes. If an employee is on paid leave status and chooses to work or attend a meeting, they will not be paid for more than their normal scheduled work day. Paid leave will be adjusted to complement time spent working or in attendance at the meeting to equal their normal work day.

The Employer solely will determine the need for overtime and offer overtime accordingly. It is understood when the Employer determines a need for overtime exists a roster will be used to balance the offering of overtime within each classification and shift within 24 hours of each other. If an employee's overtime hours exceed a 24 hour difference from the next closest person, the person with the lowest hours will be offered the overtime first.

Employees not wanting to be asked for voluntary overtime may sign an overtime release form. Employees signing such a form will not be asked for voluntary overtime. This does not preclude any employee from mandatory overtime as described below:

- a. If all employees within the classification that overtime is offered decline the opportunity to work overtime, the Employer reserves the option to offer the overtime to any qualified employee(s) in the classification of their choice.
- b. Should no employee accept the offered overtime, it shall be assigned to qualified employee(s) in the inverse order of seniority within classification and shift on their day off or scheduled work day and that employee will be required to work unless the employee is not reasonably available. An employee is not reasonably available during a scheduled leave period or while in a sick status. New probationary employees will not be assigned mandatory overtime in inverse order of seniority for their first thirty (30) days.
- c. Distribution of overtime on observed holidays will occur as follows:
  1. A holiday overtime roster will be posted at least thirty (30) days prior to the observed holiday. Each employee will indicate on the holiday overtime roster whether they desire to work the observed holiday. Employees must sign up for the fourteen (14) days prior to the holiday to be considered for the overtime.
  2. For observed holidays, the Employer will determine the level of personnel shift coverage and times of the shifts and post this information on the holiday overtime roster. Employees will be offered a shift the length of their normal workday. Any variation in shifts will be made by mutual consent between the employee and the Employer.
- d. Overtime can be offered to an employee(s) for the purpose of working on "special assignments" regardless of total overtime hours earned. Special assignments are defined as jobs requiring special skills or knowledge to complete the task and will not be awarded to avoid offering overtime following the overtime roster.
- e. This method shall run on a calendar year basis (January 1 - December 31). At the end of each year, all balances will be "zeroed out."
- f. When mutually agreed upon between a supervisor and an employee, a shift can be flexed to cover a shift or partial shift. It will be the employee's option if they choose to flex the shift and work only the amount of hours in their normal shift or work the amount of hours of their normal shift and time flexed for overtime.
- g. Compensatory Time Off: Employees may take comp time hours off in lieu of overtime hours worked under the following conditions:
  1. Accrued comp time hours can be taken by the employee only upon supervisory approval as per Section 18.5 of this Agreement. Probationary employees are not eligible to accrue or use comp time during their six (6) month probationary period.
  2. Employees may earn comp time for overtime hours worked up to a maximum accrual of forty (40) hours. Employees may use up to a maximum of sixty-eight (68) hours comp time per calendar year. Effective January 1, 2015, employees may use up to a maximum of sixty (60) hours comp time per calendar year.

3. Accrued comp time hours up to a maximum of forty (40) hours may be carried over by the employee from year to year.
4. Employees, working in a lead or higher paid classification, electing compensatory time for extra hours worked will receive the additional ninety cents (\$0.90) per hour earned at the time of the accrual. Comp time hours banked will be paid at the employee's straight-time hourly rate of pay when the comp time is taken by the employee. Comp time hours may be taken in fifteen (15) minute increments. Upon separation of employment, any accrued comp time hours will be paid to the employee at the employee's straight-time hourly rate of pay.
5. Earned overtime hours to be taken as comp time must be reported by the employee on their pay sheet or pay record and verified by the supervisor.
6. Accrued comp time hours may be cashed out in eight (8) hour increments during the first full pay period in May and during the first full pay period in November of each year. The employee must make such request in writing on or before the last day of the pay period.

**Section 17.3** Report Time. Except in cases of shutdown, other interference with operations beyond the control of the Employer or disciplinary suspensions of affected employees, all employees reporting to their work schedule as instructed on their regular shift shall be entitled to their full shift pay.

Employees are to be on time and ready to start work, including being in their work clothing prior to the start of their work shift.

**Section 17.4** Call Back to Work Pay. Call back is defined as anytime the Employer requires employees to return to work on an unscheduled basis to perform work after they have completed their regular shift and left the facility. Call in is defined as anytime the Employer requires an employee to work when an employee has not yet started their regular scheduled shift on the call in day and the work is not connected to the employee's regular work shift.

- a. If called back or called in to work, employees are required to come in to work. Mandatory attendance at a meeting is considered a call back or call in; whereas voluntary regularly scheduled shop and/or committee meetings are not. Employees working prior to a start or continuation of a shift will receive pay for the actual time worked.
- b. An employee called back or called in to work shall be guaranteed two (2) hours work, during which time the Employer may provide and require two (2) hours work of the employee. The employee will receive at a minimum two (2) hours pay at a rate of one and one-half (1 and 1/2) times their straight time hourly rate starting at the time the employee arrives at the work place or a minimum of three (3) hours straight time pay for each incident shall be paid.
- c. The same conditions listed above apply for call back or call in on an observed holiday.
- d. No one shall be required to be placed on standby for the life of this Agreement.

**Section 17.5** Shift Differential. An employee assigned to swing shift shall receive a shift differential of sixty-five cents (\$.65) per hour while assigned. An employee assigned to graveyard shall receive a shift differential of eighty-five cents (\$.85) per hour while assigned. Shift differential will be applied to all paid leaves with the exception of paid leaves used due to personal injury or illness of the employee or the employee's eligible dependents.

**Section 17.6** Temporary Assignments. It is solely a management right to determine when and if an employee shall be assigned to work as a lead or in a higher classification; this Section creates no obligation for any such designations to be made. However, in the event an employee is temporarily assigned by Management or a designee to work as a lead, in a higher paid classification, or to train other employees, the following conditions shall apply:

- a. Employees assigned to temporarily work as a lead for a minimum of two (2) consecutive hours or more per incident shall receive their mechanic straight time hourly wage rate plus an additional ninety cents (\$0.90) per hour.
- b. Employees, assigned to temporarily work in a higher paid classification other than a lead position, shall receive their straight time hourly wage rate plus an additional ninety cents (\$0.90) per hour.
- c. Employees, other than leads, assigned to provide training to other employees in a classroom like setting shall be compensated at the rate of pay of \$.50 per hour for all hours assigned to train. This Section does not apply to any side-by-side training that occurs on the shop floor within the context of sharing knowledge and techniques with each other or instructing apprentices.
- d. In no event shall an employee, while working in a lower paid classification, receive less than his/her straight time hourly rate of pay.
- h. Employees, working as a lead or in a higher paid classification, electing compensatory time for extra hours worked will be paid the additional ninety cents (\$0.90) per hour during the pay period in which the hours were worked.

**Section 17.7** Apprentice Rates. Rates of pay for apprentices shall be as set forth in Appendix A.

**Section 17.8** New Classifications. In the event that a new job classification is established or there is a substantial change in the duties or requirements of established job, the Employer shall develop an appropriate classification and rate of pay to apply to such job. The Employer shall furnish the Union with the new classification and the rate of pay to apply to such job. If the Union disagrees with the assigned rate of pay within ten (10) days from the date of such submission or within such additional time as may be mutually agreed upon, the Employer may place the new job classifications and rate in effect subject to continued negotiation for rate of pay. Any change in the established rate of a new job classification resulting from negotiations shall be retroactive to the date the rate was placed in effect by the Employer.



**Section 17.9 ASE Premium Pay.** Technicians who successfully pass the required ASE certification tests will receive an additional \$1.00 per hour pay, and will provide shop leadership coverage (serve as Lead Technician) with no additional pay.

Employees are responsible to keep certification current. Employees will lose the premium pay if certifications are not current. Probationary employees are not eligible for the ASE premium pay until probation period is completed.

Coach Technicians must pass:

- H2 – Diesel Engines
- H3 – Drive Train
- H4 – Brakes
- H5 – Suspension and Steering
- H6 – Electrical/Electronic Systems
- H7 – Heating Ventilation and Air Conditioning
- H8 – Preventative Maintenance and Inspection

Auto Technicians must pass:

- A1 – Engine Repair
- A2 – Automatic Transmission/Transaxle
- A3 – Manual Drive Train and Axles
- A4 – Suspension and Steering
- A5 – Brakes
- A6 – Electrical/Electronic Systems
- A7 – Heating and Air Conditioning
- A8 – Engine Performance
- A9 – Light Vehicle Diesel Engines

Note: See MOU, re: Tom Burke, current ASE certification pay

## ARTICLE 18—PAID AND UNPAID LEAVES

**Section 18.1** Leave Accruals. Employees are eligible to accrue paid leave benefits if they work (or in paid leave status) one half (1/2) or more of a pay period. Employees who work (or in paid leave status) less than one half (1/2) of a pay period shall receive prorated leave benefits; the proration will be based on the number of hours paid. Leave benefits accrued from the current pay period are available to the employee at the start of the following pay period (applies to all accrued leaves). An employee who exhausts their paid leave will be credited with any newly accumulated leave time upon their return to work, or at their separation of employment if the employee does not return to work. Leave benefits shall not accrue during full calendar month leaves of absences without pay.

**Section 18.2** Weather Conditions. Employees are expected to be at their jobs regardless of weather conditions. During extreme weather conditions, employees who are unavoidably absent due to weather conditions may request the use of paid vacation leave or comp time. Paid leave requests are subject to approval of the employee's supervisor or department director. In such event, an employee is expected to make contact with their supervisor as soon as reasonably possible, ordinarily in accordance with the department's established call-in/reporting procedures.

**Section 18.3** Observed Holidays. All eligible employees shall be granted six (6) observed holidays. The following holidays shall be observed by Intercity Transit the Employer: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day and Christmas Day.

- a. Dates of Holidays: Whenever possible, dates of these holidays will be so designated as proclaimed and celebrated by the State of Washington. However, management reserves the right to designate the date of observance of these holidays on an annual basis based on required level of service. Employees working a graveyard shift will observe the holiday on the day their shift ends.
- b. Eligibility for Pay: Eligible employees will receive holiday pay for their normally scheduled work hours on observed holidays, up to a maximum of eight (8) hours per holiday. To be eligible for observed holiday pay, employees must be in a full paid status on the employee's regularly scheduled workday both prior to and following the holiday. An employee may supplement two (2) hours of accrued paid leave (vacation, or comp time) in cases of ten (10) hour work shifts. Requests to supplement leave must be made prior to the holiday.

Probationary employees are eligible for observed holiday pay. Temporary employees are not eligible for observed holiday pay.

- c. Required to Work: If an employee is required to work on the observed holiday, the employee shall receive eight (8) hours holiday pay plus one and one-half (1 1/2) their straight time hourly rate for each hour worked on such holiday.

- d. Scheduled Day Off: When an observed holiday falls on an employee's regularly scheduled day off, the employee may opt to receive eight (8) hours vacation time or to receive eight (8) hours holiday pay in addition to their regular pay for that week. Probationary employees are only eligible to receive paid holiday pay; they are not eligible for vacation time while still on probation.
- e. Observance of Religious Holidays: If an employee's religious beliefs require observance of a holiday not included in the observed holiday schedule, the employee may request the day off using paid leave (vacation leave, or comp time). Requests require supervisory approval.

**Section 18.4 Floating Holidays**. Intercity Transit employees work many traditional holidays. In lieu of these holidays, each "eligible employee" will receive five floating holidays each year. These will be awarded by adding up to forty vacation hours to each employee's accumulated vacation hours on January 1 of each year.

Employees, who are not active for duty on January 1 and who return to work after January 15 and remain in paid status, shall receive accrued floating holidays in the form of vacation hours on their date of return to work based on the following schedule:

Returning to work by April 1	<i>32 hours</i>
Returning to work by July 1	<i>24 hours</i>
Returning to work by October 1	<i>16 hours</i>

A new employee serving an introductory period shall receive one floating holiday (8 hours vacation time) at the start of his/her introductory period. The new employee shall receive vacation hours in lieu of floating holiday time on the following schedule:

In paid status April 1	<i>24 hours</i>
In paid status July 1	<i>16 hours</i>
In paid status October 1	<i>8 hours</i>

**Section 18.5 Annual Vacations**. Employees accrue vacation credit on a biweekly basis for each full bi-week (fourteen (14) continuous calendar days) of service in which the employee is in a paid status. Vacation credit will be prorated for any bi-week in which the employee is on an unpaid leave of absence or disciplinary suspension, based on the number of paid hours received.

Employees who are assigned to work forty (40) hours or more per week will accrue paid vacation credit in accordance with the vacation accrual schedule listed below. Employees scheduled to work three-quarter time (equates to 30-39 hours per week) will accrue paid vacation credits at a rate equivalent to three-fourths the full-time rate per month. Employees scheduled to work half-time (20-29 hours per week) will accrue vacation leave credit at the rate equivalent to one-half the full-time rate per month. Employees scheduled to work less than 20 hours per week are not entitled to accrue vacation leave credit.

## VACATION ACCRUAL HOURS AND DAYS SCHEDULE

START OF SERVICE YEAR	CURRENT ANNUAL HOURS	CURRENT ANNUAL DAYS		EFFECTIVE 1/1/15 ANNUAL HOURS	EFFECTIVE 1/1/15 ANNUAL DAYS
1	96	12		96	12
2	104	13		104	13
3, 4	112	14		112	14
5	120	15		120	15
6, 7	128	16		128	16
8, 9	136	17		136	17
10	136	17		<u>144</u>	<u>18</u>
11, 12	144	18		<u>152</u>	<u>19</u>
13, 14, 15, 16	152	19		<u>160</u>	<u>20</u>
17, 18	160	20		<u>168</u>	<u>21</u>
19	168	21		<u>176</u>	<u>22</u>
20, 21, 22, 23, 24, 25	176	22		<u>184</u>	<u>23</u>
26 or more	184	23		<u>192</u>	<u>24</u>

- a. Eligibility: Probationary employees are not eligible to receive vacation leave during their probationary period. Upon satisfactorily completing their probationary period, the employee will receive vacation leave retroactive to their date of hire into the bargaining unit. Temporary employees are not eligible to accrue vacation leave.
- b. Requests for Vacation: An employee may request and use vacation with pay at the rate in effect for each day of vacation period, including shift differential, subject to the following conditions:

1. The Employer shall have the right to establish a vacation schedule determining the number of employees allowed vacation on given dates.
  2. The vacation year shall be defined as a twelve (12) month period beginning April 1st and ending the following March 31st.
  3. Seniority within class shall prevail for any requests received prior to March 15th for dates in the following vacation year.
  4. For requests received after March 15th, first come, first serve shall prevail. In the event two or more requests are received on the same day for the same available dates, seniority as defined in 3. above shall then prevail.
  5. Requests made within seven (7) days of the requested day off will be covered with voluntary overtime or the request will be denied.
  6. When possible, every effort shall be made to accommodate vacation requests beyond those parameters. When not possible, reasoning will be provided to the employee.
- c. Carryover of Unused Vacation: Vacation leave may accrue from year to year with a maximum accrual limit of three hundred and forty (340) hours on the employee's vacation accrual anniversary date. Effective on the employee's vacation accrual anniversary date, the employee shall forfeit any vacation leave in excess of the three hundred and forty (340) hour maximum accrual limit allowed. Payment for vacation time in excess of the three hundred and forty (340) hour maximum accrual limit will be permitted only in those cases where the Employer has canceled an already approved request to use such vacation leave; said payment is subject to the approval of the Director of Maintenance.

Vacation leave may accrue from year to year with a maximum accrual limit of three hundred forty (340) hours on the employee's vacation accrual anniversary date. Upon the employee's vacation accrual anniversary date the employee shall forfeit any vacation leave in excess of the three hundred forty (340) hour maximum accrual limit allowed. Payment for vacation time in excess of the three hundred forty (340) hour maximum accrual limit will be permitted only in those cases where the Employer has canceled an already approved request to use such vacation leave; said payment is subject to the approval of the Director of Maintenance.

- d. The Employer and the employees shall cooperate to the fullest extent possible to allow all employees the opportunity to schedule their vacations.
- e. Pay Upon Termination: Upon termination of employment for any reason, an employee will be paid at the employee's straight time hourly rate of pay, exclusive of shift differential, for accrued but unused vacation credits.
- f. Vacation Week: An employee who takes off 5 consecutive days will not be subject to mandatory call-in for duty on their regular days off that are immediately prior to or after the five days of vacation leave.

## Section 18.6 Sick Leave.

- a. Accrual of Sick Leave: Employees covered by this Agreement shall accrue sick leave up to twelve (12) days per year, credited on a pay period basis. Employees must be in a full paid status in order to earn sick leave credits. Sick leave credits will be prorated for any pay period in which the employee is on an unpaid leave of absence or disciplinary suspension, based on the number of regularly scheduled paid hours received by the employee for the pay period. Sick leave shall accumulate from year to year not to exceed a cap of nine hundred sixty (960) hours. In accordance with Section 18.8, employees may be eligible to cash out a portion of their accrued sick leave at the time of employment separation.

Employees scheduled to work less than twenty (20) hours per week are not entitled to accrue paid sick leave credits. Temporary employees are not eligible to accrue paid sick leave.

- b. Rate of Pay: Sick leave shall be paid at the employee's straight time hourly rate of pay, exclusive of shift differential. An employee shall not be entitled to more sick leave hours per day than the regularly scheduled hours of work. In all cases, accrued sick leave will be paid only for the period of actual disability. After all accrued sick leave is exhausted, vacation leave and compensatory time, in that order and exclusive of shift differential, will be used for absences due to illness. Once all paid leave is exhausted, the employee will be placed on a medical leave of absence without pay.
- c. Sick Leave Eligibility: Each employee shall be eligible to use earned sick leave credits only in the event the employee is wholly or partially incapacitated by actual disability or illness on days taken as sick leave (or as otherwise provided in Section 18.6.d. below) and the employee notifies their supervisor at least one hour before the start of their shift so as to allow for scheduling for replacement personnel.

Sick leave is provided to protect an employee in case of illness or disability. Use of sick leave for other purposes and/or abuse of sick leave shall be the basis for disciplinary action up to and including termination. Employees are expected to be at work on a regular basis.

- d. Definition of Disability: A disability, as applied in this Section, shall mean disabilities caused by: bona fide personal injury or illness of the employee or forced quarantine of the employee; inpatient/outpatient medical care and appointments; dental care and appointments; or pregnancy, childbirth or pregnancy-related condition of an employee which prevents the employee from performing the employee's normal job duties.

Other reasons for which an employee may use sick leave are:

1. To care for an employee's spouse or designated other with a health condition that requires treatment or supervision. "Designated other" shall be defined as an individual whom the employee has designated at the beginning of each calendar year; the designation must be received by the Employer by January 15 of each year. Designation shall be made by completing an "Employee Designated Other" Form as furnished by the Employer. Employees shall be limited to naming only one (1) designated other at a time.

2. To care for an employee's child nineteen (19) years of age or under with a health condition that requires treatment or supervision; to care for an employee's child of any age who is incapable of self-support due to developmental or physical disability with a health condition that requires treatment or supervision; or to care for an employee's parent or parent-in-law with a health condition that requires treatment or supervision. The child, parent or parent-in-law term applies equally to natural, step, adoptive or custodial family relationships.
3. In the event of the death of an employee's lawful spouse or designated other (as defined above), or the employee or spouse's father, mother, brother, sister, child, grandparent, grandchild, aunt, or uncle, the employee shall be granted bereavement leave with pay for a maximum of three (3) workdays; provided the employee has sufficient accrued sick leave, vacation leave, or comp time to cover the employee's absence. Such leave will be charged against the employee's accrued leave hours as the employee elects. Additional time may be requested by the employee, but is subject to the approval of the supervisor. Family member terms apply equally to natural, step, foster or adoptive family relationships. Verification of death may be required by the Employer. Such verification may be in the form of a published funeral notice, obituary, or death certificate.

For payroll purposes, the use of paid sick leave hours for bereavement leave reasons will not be counted as hours worked for overtime base calculation. The use of paid vacation leave for bereavement leave reasons will be counted as hours worked for overtime base calculation. The use of paid leave hours for bereavement purposes will not require a doctor's certification as referenced in Section e. below, nor will the hours count towards discipline as referenced in Section f. below.

4. In addition to the above, an employee is eligible to request unpaid time-off under Washington State's family leave laws or the Federal Family Medical Leave Act (FMLA) for employee, child or family member related care purposes. Written notice of intent to take family leave must be provided to the Employer thirty (30) days before the anticipated first day of the leave, unless an emergency exists.
- e. Employees will avoid the use of sick leave that creates a pattern of extending weekends, holidays, vacation, or comp time.

Approval of Sick Leave Usage: Sick leave shall be granted and approved by the Director of Maintenance or his designee for any disability or illness. A doctor's certificate of disability or illness shall be required prior to being able to return to work whenever one of the following occurs. A doctor's certificate must verify the employee was absent because of illness, list the inclusive dates the employee was unable to work because of said illness, and the employee is physically able to return to work. Failure to supply the Employer with the verification including the information listed above will result in discipline and disapproval of the leave pay.

1. An employee is absent three (3) or more consecutive days. A day absent, for the purpose of this application only, is defined as an employee working less than one half their assigned shift.
2. An employee uses time off for illness in conjunction with an observed holiday,

vacation, or compensatory time. The exception is if an observed holiday falls on the employee's day off.

3. The employee has used more than ninety-six (96) hours of sick leave during the twelve (12) month period. If an employee supplies a verification of illness as described in Section e. above, the hours absent because of said illness will not count toward the ninety-six (96) hours for this requirement only; provided however, the hours absent because of said illness will count for Section f. below.

Employees with a sick leave balance greater than 300 hours shall not be subject to Section e. above or Section f. below.

An employee may use up to sixteen (16) hours of sick leave per twelve (12) month period for pre-scheduled medical appointments. This sixteen (16) hours will not be counted toward the ninety-six (96) hours in Section e.3. above. Time off for a pre-scheduled medical appointment must be requested in accordance with the procedure for requesting vacation, or compensatory time. A doctor's verification of the appointment must be provided.

- f. Discipline: Each time an employee has exhausted their sick leave the following discipline will occur:
  1. The first occurrence in a twelve (12) month period, where an employee has exhausted their sick leave balance, the employee will receive an oral warning.
  2. On the second occurrence in a twelve (12) month period, where an employee has exhausted their sick leave balance, the employee will receive a written warning.
  3. On the third occurrence in a twelve (12) month period, where an employee has exhausted their sick leave balance, the employee will be suspended without pay for a period of three (3) workdays.
  4. On the fourth occurrence in a twelve (12) month period, where an employee has exhausted their sick leave balance, the employee will be terminated.
- g. Serious Health Condition: An exception to Section f. above is when an employee has unusual circumstances that create the need for high usage of sick related paid leave in a twelve (12) month period. These circumstances must be defined as a serious health condition under federal or state family leave laws. If the employee submits proper doctor certification of the condition, the sick related hours used for those days will not be counted toward their sick usage in that twelve (12) month period.
- h. L & I: An exception to Section f. above, is when an employee is absent due to an approved Department of Labor and Industries (L & I) injury/illness. The leave time used for the L & I time loss will not be counted toward sick leave used in that twelve (12) month period. A doctor's verification, as described in Section e. above, of the employee's illness and time loss period is required.



- i. Industrial Injury: Employees injured on the job shall report such injury immediately to their immediate supervisor, or as soon as reasonably possible, upon discovery. An employee who leaves work and seeks medical care because of incapacity due to industrial injury will be paid their full shift pay at their straight time hourly rate of pay for the day on which the injury occurs only. A doctor's certificate as referenced in Section e. above and in Article 15 is required.

Intercity Transit will provide Workers Compensation Insurance in accordance with State statutory requirements. If an employee is absent due to illness or injury for which they are receiving payment from a Worker Compensation Insurance, the employee may elect to also use accrued sick leave hours together with payment from the State.

The employee is required to notify the Employer if the employee elects to use accrued sick leave to supplement their earnings and elect the percentage of sick leave hours to be used. Use of any paid sick leave for an on the job injury will be calculated on a retroactive basis back to the first day in which the employee was off work due to the injury or illness. The employee's available sick leave hours will be used until exhausted unless the employee opts to stop the sick leave usage. After the initial designation the employee may request such compensation be started or terminated at any time, but such request shall only be made once per injury.

Upon exhaustion of accrued sick leave, the employee may elect to use, in the same manner as defined above, other accrued leave hours (vacation leave) retroactive to date of exhaustion of paid sick leave. Such available leave hours will be used until exhausted. The employee may request such compensation to be started or terminated at any time, but such request shall only be made once per injury. Vacation leave hours are not subject to buyback.

Upon return to work from a worker's compensation leave period, an employee may buy back sick leave hours. The employee may elect to purchase back all or a portion of the sick leave hours used and paid to the employee during the employee's disability period. The employee must notify the Employer of their intent to buy back paid sick leave hours; such notification must be made to the Employer within forty-five (45) days from the date upon which the employee returns to work from the disability. The employee shall make payment to the Employer in the manner prescribed by the Employer for such leave hours. Once the employee has made payment to the Employer for the total amount due based on the number of hours the employee has elected to buy back, the employee's leave hours will be added back to the employee's accrual records.

- j. Transitional Work Assignment: Employees who experience an on-the-job injury or illness which results in their temporary inability to return to the full range of duties of their regular position classification will accept transitional work assignments if offered by the Employer. Employees who experience an off-the-job injury or illness which results in their inability to return to the full range of duties of their regular position classification may be eligible for transitional work assignments if offered by the Employer.

1. Transitional work assignments will consist of work which is within the restrictions outlined by the employee's health care provider. Such assignments may be: part-time or full-time, with a temporary waiver of certain regular duties (reasonable accommodation), in an employee's regular position classification; or part-time or full-time in another capacity.
2. Employees assigned to transitional work assignments will receive their straight time hourly rate of pay for their regular job classification for the number of hours worked in the transitional work assignment.
3. Assignment to transitional work depends upon the availability of such work and of work suitable to the employee's medical restrictions. Due to conditions associated with the operation of the Agency, a transitional work assignment may be terminated at any time by the Employer.
4. For employees with non-job-related injuries/illnesses, assignment to transitional work may be ended in order to provide transitional work assignment to an employee injured on-the-job.
5. If an employee has received clearance from their medical provider to work a transitional work assignment and then refuses to work the transitional work assignment, the employee will not be eligible for worker's compensation benefits or paid leave benefits.
6. The Union and the Employer will meet to resolve any issues that may arise in the implementation of transitional work assignments.

**Section 18.7 Medical Leave.** An employee unable to work due to a disability shall be granted a medical leave of absence effective the first day of absence from work, provided the employee makes written claim of such illness or injury on forms provided by the Employer. The form shall contain the first date of disability, the nature of the disability, anticipated date of return to work and the signature of the attending physician.

When an employee is off due to extended illness or injury other than job-related, the employee shall first utilize accrued sick leave, vacation leave, and comp time. During this time, while on paid leave, the employee shall continue to earn paid leaves and receive benefits under this Agreement. Upon exhaustion of paid leave, the employee shall be placed on a Leave Without Pay status. Whether on paid or unpaid status, the employee's leave period shall not exceed twelve (12) months from the first day off due to such non-on-the-job illness or injury. For on-the-job injury situations, the employee shall be entitled to have an eighteen (18) month leave period from the first day off due to the on-the-job illness or injury. Upon completion of the twelve (12) months or the eighteen (18) months, the employee's rights, benefits and employment shall cease.

An employee shall notify the Director of Maintenance or designee as far in advance as possible. In cases of planned absence such as those resulting from scheduled surgery or childbirth, the employee will provide a certificate from the employee's physician indicating the employee is physically capable of performing the employee's normal assigned tasks prior to returning to work from the absence.

An employee on medical leave for longer than thirty (30) days shall provide the Director of Maintenance with a monthly written status report from the employee's attending physician.

Return from Medical Leave. An employee on Medical Leave less than thirty-one (31) days but more than fourteen (14) days shall return to work by notifying the Director or designee of the employee's intention one (1) full workday prior to returning to work. An employee on Medical Leave for more than thirty (30) days shall return to work within seven (7) days of notifying the Director of Maintenance of their intention to return to work. Upon return to work, the Employer shall require the employee to provide a written statement from the attending physician certifying the fitness of the employee.

**Section 18.8** Sick Leave Cash Out/Trade Policy.

- a. Cash Out at Separation of Employment Retirement: Upon separation of employment or retirement, under non-disciplinary circumstances and with completion of at least five (5) years of employment with the Employer, each employee shall be paid for all accumulated sick leave at the following rate:

Hours of Accrued Sick Leave	Cash out Rate
0 to 400	1 to 5 for hours 1 to 400
401 to 600	1 to 4 for hours 1 to 600
601 to 960	1 to 3 for hours 1 to 960

The parties agree that employees who work up to their lay off date and who then are officially laid off will be eligible to cash out their accrued/available sick leave. If the employee is recalled to their job during their 18 month recall period, the employee may buy back all of the accrued sick leave hours they had available at the time of their layoff, provided the employee pays back the money they received for the cashed out hours. Employees may not buy back just a portion of their sick leave hours. In a recall scenario, the employee must buy back all of the hours cashed out within the first sixty (60) days of their reemployment.

- b. Sick Leave Trade: Employees who have accrued in excess of four hundred (400) hours of sick leave may annually in June exercise one of the following options for hours in excess of four hundred (400):

Trade four (4) hour increments of sick leave for one (1) hour of vacation;  
Continue to accrue sick leave; or  
Trade four (4) hour increments of sick leave for one (1) hour of pay.

Employees will be allowed to trade up to ninety-six (96) hours of sick leave each year.

- c. All pay for sick leave cash out or trade shall be at the employee's regular straight-time hourly rate of pay at the time of the cash out or trade. Payment for sick leave hours cashed out will be included in the employee's final paycheck.

**Section 18.9** Jury Duty Leave. An employee shall continue to receive their regular wages for any period of required service as a juror. A copy of the court notification for required jury duty must be provided to the employee's supervisor fourteen (14) days prior to the commencement of the jury duty.

If an employee is scheduled to perform jury duty outside their normally scheduled shift the employee may make arrangements to flex their shift if approved by the supervisor.

If an employee is not required to perform jury duty that consists of the employee's regularly scheduled work hours, he/she will be required to work the remaining hours on their assigned shift. An employee may make arrangements to take vacation, personal holiday, or comp time in lieu of working in accordance with Section 18.5. Travel time to and from jury duty is not paid time. Any funds received by the employee from the court for jury duty may be kept by the employee.

**Section 18.10 Military Leave.** Military Leave shall be provided in accordance with the Uniformed Services Employment and Reemployment rights Act (USERRA), RCW 38.40.060 and other applicable laws. Written verification supporting the request for Military Leave shall be submitted by the employee in a timely manner.

**Section 18.11 Other Non-Medical Leaves.** The Employer may, at its discretion, also grant leaves of absence with or without pay for other reasons the Employer considers valid such as for education purposes or personal non-medical related problems. Staffing and work requirements will be a consideration prior to the granting of any such leaves. Requests for leaves must be made in writing to the Director of Maintenance. Non-medical leaves shall not exceed a period of twelve (12) months from the first day of the approved leave. Unpaid time off shall not be granted unless the employee has used all available and accrued paid leaves (vacation leave and comp time).

At termination of any leave of absence, the employee shall, upon application to the Director of Maintenance, be returned to their former classification or previously held classifications to which the employee's seniority entitles the employee to hold. In the event the former classification has been abolished, then the employee will be assigned to an equivalent or lower related classification, if available and seniority permitting. In each case, the employee will receive the prevailing rate of pay for the classification to which the employee has been assigned. If the employee's seniority is insufficient to be returned, the employee shall be considered laid off per the provisions of Article 22.

**Section 18.12 Shared Leave Policy.** Employees may participate in the Shared Leave Policy adopted by the Employer per POHR 3501. This policy allows eligible employees to donate a portion of their accrued vacation leave to other eligible employees who are in need of assistance owing to serious illness or injury.

## ARTICLE 19 PERSONNEL BENEFITS

### **Section 19.1** Health Care Insurance.

Plan and Contribution Rates: The Employer provides health care insurance to all eligible employees. Employer and employee monthly contribution rates are determined by the Employer based on the guidelines established for State employees by the Washington State Health Care Authority. Employees are required to pay, through payroll deduction, the employee share of the monthly contribution premium.

Type of Coverage: Coverage begins on the first day of the month following start of employment. Benefits consist of routine medical care, hospitalization, drugs, major medical expenses, dental care, basic life insurance and basic long-term disability insurance as long as available as an employer option to Intercity Transit through the Washington State Health Care Authority. Specific types of coverage, employee/dependent eligibility definitions and benefit payment schedules are described in Intercity Transit's health care plan booklets available to eligible employees through Human Resources.

Self-Pay Due to Leave of Absence: Health care coverage is available to an employee on unpaid leave of absence provided the employee continues to pay for the coverage on a self-pay basis.

COBRA Due to Separation of Service: Upon separation from Intercity Transit employment or other qualifying event, an employee and/or the employee's eligible dependents may elect to continue health benefits at their own expense to the extent provided by law.

Legislation: In the event Federal and/or State legislation is enacted which affects the existing health care provisions, the parties shall meet to bargain over the impact of such legislation.

**Section 19.2** State Pension (PERS). The employee and Employer shall be participants of the Washington Public Employees Retirement System (PERS) and subject to the rules and regulations of Washington State Law. Retirement information shall be provided by the Employer at the request of the employees.

**Section 19.3** Deferred Compensation Plan. The Employer will contribute 7.65 percent (0.0765) of total wages for those employees hired on or before March 31, 1986, and for those employees hired on or after April 1, 1986, the Employer will contribute 6.20 percent (0.0620) of total wages to a deferred compensation plan of the member's choice, as established by the Employer under Section 457 or 401(k) of the Internal Revenue Code, for each participating employee on a per pay period basis.

The employees shall be covered by this deferred compensation plan unless the Employer is required to contribute additional FICA (Federal Insurance Contributions Act) employee contribution matches. It is agreed that these amounts will offset the Employer's contributions as defined above.

The provisions of this section shall only apply to an employee electing to make contributions to the same deferred compensation plan in an amount equal to, or more than, the Employer's

contribution as defined above. The Employer shall have no obligation to contribute to the deferred compensation plan for employees who fail to contribute to the plan, or for those employees who choose to contribute less than the established Employer contribution amount as defined above.

A member of the bargaining unit may be nominated by the Union to serve on the Employer's Pension Committee.

**Section 19.4** Tuition Reimbursement. The Employer shall establish an account from which employees will be eligible to be reimbursed for educational courses under the following conditions:

- a. The employee has made application for, and received written approval from the Maintenance Director for each course prior to the taking of the course. Employees who have been suspended within the past twelve (12) months are not eligible to apply for tuition benefits.
- b. The employee submits satisfactory completion of the course. In terms of an academic grade a "C" or better shall meet this requirement.
- c. Funds for the course are available in the tuition account.
- d. The course is related either directly or indirectly to the employee's position.
- e. This account shall be funded by the Employer in the amount of \$2,000.00 per year.

**Section 19.5** Employee Assistance Program. All employees will be eligible to participate in the Employer sponsored Employee Assistance Program.

**Section 19.6** Transportation Passes. Free transportation passes shall be provided to all active employees and their dependents. For purposes of this section, dependents shall be defined as the employee's spouse or children (child must be nineteen [19] years of age or under). The term child applies equally to natural, step, adoptive or custodial family relationships. Transportation passes will also be provided to all retired employees and their spouses. The passes will be honored on all of the Employer's regularly scheduled buses and vans.

**Section 19.7** Employer Sponsored Events or Programs. Participation in Employer sponsored events/programs (employees are eligible to receive prizes, awards, incentives and compensation as the Employer may deem appropriate for their participation in Employer sponsored events or programs).

**Section 19.8** Human Resources Rules. Contract language shall supersede whenever in conflict with any provisions of the Human Resources Rules. Notwithstanding the above, however, the Union agrees that the Employer shall maintain the right to make changes to any provision in the Human Resources Rules at any time without negotiating said change with the Union provided that said change applies across-the-board to all Intercity Transit employees.

## ARTICLE 20 - PERSONAL TOOLS AND WORK CLOTHES

**Section 20.1** Personal Tool Allowance. The Employer will provide an annual tool allowance to all Mechanics required to provide personal tools as part of their duties of employment in the amount of \$500.00 per year, payable semiannually (\$250.00 paid the last full pay period in June and \$250.00 paid the last full pay period in December). The Employer will provide an annual tool allowance to all Support Specialists required to provide personal tools as part of their duties of employment in the amount of \$250.00 per year, payable semiannually (\$125.00 paid the last full pay period in June and \$125.00 paid the last full pay period in December).

- a. Eligibility: In order to be eligible for the full tool allowance, employees must be full-time employees who have successfully completed their probationary period and are in an active paid status for each full six month period. If an employee is not in an active paid status for the entire six month period, benefits shall be prorated for that portion of the six months actually spent in an active paid status; if the employee is on an unpaid status at the time the tool allowance is due, he shall be paid such prorated benefits upon return to active paid status. New employees shall be considered eligible for a tool allowance after completion of their probationary period; tool allowance benefits shall be prorated from the date of initial eligibility. The allowance will be paid through the payroll process. The amount will be considered part of gross earnings and is subject to all withholdings and required deductions.
- b. Tool Inventory/Insurance: The Employer will provide insurance coverage based on replacement value for job related tools in the event of loss or damage due to fire, theft or other catastrophic loss. As a condition of this insurance, each employee is required to provide and maintain an accurate inventory of all tools kept on Intercity Transit property. It is solely each employee's responsibility to provide the Employer with an accurate tool inventory. Each individual is responsible for updating their inventory whenever additional tools are acquired. This list will be reviewed and signed by the employee's supervisor. If a loss occurs, only those tools listed on a signed tool inventory will be replaced.
- c. Repair of Tools: Employees are responsible for all costs associated with the repair or replacement of their own tools.
- d. Special Tools: All special and heavy-duty tools, power tools and tools larger than one-half inch (1/2") drive shall be furnished and maintained by the Employer.

**Section 20.2** Safety Shoes. Employees, as required by classification and work shift, will receive \$150.00 per year for the purchase of protective-toed safety shoes or protective oil resistant soled safety shoes. Employees will receive a Safety Shoe Allowance in the first full pay period of each year of the current labor agreement in the amount of \$150.00. New employees will receive an amount pro-rated based on the remaining portion of the calendar year. All Safety Shoe accumulated balances as of December 31, 2013, will be cashed out on the first full pay period of 2014.

**Section 20.3** Work Clothes. The Employer shall continue to provide work clothing and foul weather gear as currently provided.

## ARTICLE 21 - SENIORITY

**Section 21.1** Definition of Seniority. For purpose of this Article, seniority shall be used for determining retention of position (after completion of probation period), selection of shift assignments and vacation scheduling. Seniority shall be defined as the length of continuous time of service with the Employer within classifications covered by this Agreement plus the provisions of Section 21.2 and 21.3 listed below. If two or more employees are hired on the same day, seniority preference will first be given to the bargaining unit member and then assigned by date of application.

Seniority as calculated herein shall not be used in determining benefit eligibility/accrual and step adjustments (see applicable articles).

**Section 21.2** Effect of Probation on Seniority. If an employee is laid off during his probationary period and subsequently rehired, any seniority accumulated during the twelve (12) months immediately preceding his rehire date shall be counted toward his probationary period.

**Section 21.3** Additional Accumulation. Seniority shall include in addition to length of continuous time of service defined in Section 21.1 above:

- a. The time lost by reason of industrial injury, industrial illness or jury duty.
- b. The time spent on authorized medical leave of absences, parental and family leaves.
- c. The time spent on leave of absence granted for the purpose of serving in the Armed Services of the United States.
- d. The time spent on authorized Union business or on leave of absence for Union business.
- e. The first thirty (30) days of any other authorized leave of absence.
- f. The time on layoff from the bargaining unit not to exceed in each instance a period of eighteen (18) months.

**Section 21.4** Loss of Seniority. An individual shall lose seniority rights for the following reasons:

- a. Voluntary resignation.
- b. Discharge for just cause.
- c. Retirement.
- d. Layoff for a period of eighteen (18) months.
- e. Declining recall from layoff subject to the terms of Article 22.



- f. Prolonged disability other than those covered by Industrial Insurance claims for longer than one (1) year.
- g. Prolonged disability due to an industrial injury longer than eighteen (18) months.

**Section 21.5** Apprenticeship Program. An Apprentice shall gain seniority in the mechanic classification from their first day of work in the Apprenticeship Program. For the purpose of shift selection, Article 27 Shift Bidding shall apply.

## ARTICLE 22 - LAYOFF, RECLASSIFICATION, DOWNGRADES & RECALL

**Section 22.1** Definitions. The meanings of certain terms used in this Article 22 and elsewhere in this Agreement are stated below:

- a. Reduction in Force (RIF) refers to reduction of the number of employees within a classification as listed in Appendix A of this Agreement.
- b. Reclassification refers to placement into a classification of equal pay when a RIF occurs.
- c. Downgrade refers to placement into a classification of lower pay when a RIF occurs.
- d. Recall refers to the process of reinstatement of employees to former jobs held which were lost by reason of a RIF.
- e. Layoff refers to the severance of employment of an employee due to a RIF.

**Section 22.2** Notification of Layoff. The Employer shall inform the Union Steward and the employees affected of date of layoff thirty (30) days or more in advance of such scheduled layoff.

**Section 22.3** Reduction in Force Procedures. Reverse order of seniority within classification, shall determine which employee is affected by the RIF.

**Section 22.4** Reclassification and Downgrade Rights. An employee affected by a RIF shall be granted rights of reclassification or downgrade to any previously held classifications if their seniority is greater than the seniority of another employee in such classification. The Employer shall offer the classification with highest rate of pay first to an employee with these rights, then if refused, shall offer the next lower paid classification held and so forth until all classifications previously held are exhausted. An employee may choose layoff rather than exercise these rights.

**Section 22.5** Recall Rights. If an opening occurs, employees laid off or downgraded shall be recalled to previously held classifications based on the reverse order of the RIF subject only to the terms listed hereafter in this Agreement:

- a. Employees shall retain recall rights for a period of eighteen (18) months from date of the reduction in work force.
- b. Notice of Recall shall be sent to a laid off employee at the employee's last known address by certified/registered mail. It shall be the responsibility of the employee to keep the Employer informed of their current address. Any employee who fails to report for work within ten (10) days from the date of mailing notice of recall shall be considered resigned and shall have their name removed from the Recall List, unless such laid off employee is temporarily incapacitated preventing the employee from reporting or is employed elsewhere, in which case the employee must notify the Employer in writing within five (5) days after the receipt of the notice to return for work as quickly as the employee's health will permit or to give adequate termination notice to the employee's present employer.

- c. An employee on layoff or downgrade who rejects a recall offer to a classification previously held shall lose recall rights to such classification only.
- d. Intercity Transit employees with recall rights shall be notified in writing of recall seven (7) days in advance of such recall. The employee shall be allowed twenty-four (24) hours to accept or decline.

## ARTICLE 23- PROBATION

New Employees. All new employees shall serve a probationary period of six (6) months commencing on their date of employment with the Employer. Upon the completion of the probationary period, the employee shall be considered as having satisfactorily demonstrated qualifications for the position and shall gain regular employee status. The employee shall be verbally notified of successful completion by their supervisor. Upon mutual agreement of the parties, an employee's probationary period may be extended.

The retention of such employees shall be strictly within the discretion of the Employer. Such employees shall not have recourse through the grievance procedure with regard to disciplinary actions, including discharge. Rejected employees shall be notified of such action in writing by the Department Director or designee at any time during their probationary period.

On other contractual matters, except as noted below, the probationary employee shall be entitled to the same rights as other employees subject to the terms of this Agreement.

1. Probationary employees are not eligible to receive floating holiday leave during their probationary period. Upon satisfactorily completing their probationary period, the employee will receive floating holiday leave retroactive to their date of hire into the bargaining unit. If the probationary employee receives holiday leave late in the year, but is unable to take the leave based on departmental operating needs, the employee will be cashed out their accrued holiday leave at the end of the year. If the probationary period extends between two years, the employee, upon successful completion of probation, will be credited with the appropriate number of floating holiday hours from both years.
2. Probationary employees are not eligible to receive vacation leave during their probationary period. Upon satisfactorily completing their probationary period, the employee will receive vacation leave retroactive to their date of hire into the bargaining unit.
3. Probationary employees are not eligible to accrue or use compensatory time during their probationary period.

## ARTICLE 24- PROMOTIONS AND TRANSFERS

**Section 24.1** Job Openings and Posting. Promotion and transfer within the bargaining unit shall be made pursuant to the following procedures:

- a. The Employer shall post all vacancies, job openings and new classifications and it shall remain posted for five (5) days. The notice shall state the number of jobs to be filled, the work schedule, the shift, the rate of pay for each job to be filled and a description of the work required and minimum qualifications.
- b. The notice shall be posted and applications received from employees prior to initiating public recruiting efforts, unless the vacant position is at the lowest classification level or, on the approval of the General Manager, it is in the best interests of the Employer to concurrently recruit internally and externally where, for example, there is a need to fill the position without delay or the position requires license or certificates, specialized qualifications not known to be possessed by employees.
- c. Human Resources shall be responsible for the initial screening of all employee applications for vacant positions for the purpose of determining which applicants possess the minimum qualifications. Human Resources shall refer the most qualified candidate(s) to the Maintenance Director, or designee, for interviews and/or testing. If the Maintenance Director is not satisfied with the candidate(s), additional recruiting may be requested.
- d. An employee who is not selected for the test and/or interview may request a meeting with the Maintenance Director to learn the reasons why the employee was not selected.
- e. In the selection of an employee to fill a vacancy, in addition to experience, training and education, the following factors may be considered:
  - Qualifications, skill, ability and past performance;
  - Efficiency;
  - Disciplinary record;
  - Attendance record; and
  - Length of service.
- f. If any employee/applicant demonstrates that they have the qualifications necessary to perform the position at a level of necessary competence, then the employee/applicant with the highest such qualifications as determined by the Employer shall be hired for the vacant position.
- g. In cases of promotion within the bargaining unit, the employee will receive, at a minimum, a five percent (5%) wage increase above their current wage.

**Section 24.2** Right to Return to Former Position. Bargaining unit employees who transfer or are promoted to a position with Intercity Transit but not covered by this Collective Bargaining Agreement shall have the right to return to their former position for a period not to exceed six (6) months.

Any employee exercising their right to return to their former position shall have the same seniority as of the time they transferred out, but in no case will they accumulate seniority while working outside of the Bargaining Unit.

## ARTICLE 25- APPRENTICESHIP

When the need arises, the Employer and the Union agree to develop a joint Apprenticeship Program. In establishment of an Apprenticeship program, no rules will be adopted which conflict with the terms of this Collective Bargaining Agreement.

In no event should an employee selected for the apprentice program be paid less than their wage rate of their classification from which they were selected.

Apprentice wage rates for each employee will be adjusted to be effective in the first full pay period after completion of each six (6) months of service; six (6) months of service shall be defined as completion of the requisite 1000 hours of participation in the requirements of the apprenticeship program and does not necessarily relate to the passage of calendar months, except that adjustments in the wage rate shall not be made more frequently than every six (6) calendar months.

## ARTICLE 26- SUBCONTRACTING

The Employer shall not contract out work performed as of the date of this contract by members of this bargaining unit if the contracting of such work eliminates or reduces the normal workload of the bargaining unit. If a condition arises that necessitates contracting of work normally performed by the bargaining unit, the Union shall be offered an opportunity to be involved in the planning process; provided, however, the Employer shall have the right to make the final decision regarding subcontracting.

If, in order to secure funding for a specific project, the Employer is required to contract all or part of the work to be performed due to the limitations imposed by the funding agreement, such contracting shall not be considered a violation of the Agreement.

In the case of a circumstance which is beyond the control of the Employer at the time action is required and which could not reasonably have been foreseen, or the Employer is not reasonably able to provide the necessary tools, personnel or equipment to timely perform the work, the Employer shall be allowed to enter into subcontracting for this project and not be in violation of the Agreement.



## ARTICLE 27- SHIFT BIDDING

The Union shall be offered the opportunity to be involved in creating shifts through their natural work groups. Proposed shifts will be offered to the Director of Maintenance for approval. The Director shall have the final decision regarding shifts.

An apprentice will be assigned their work shift at the conclusion of the shift bid process. This is to ensure proper training with a journeyman as defined in Section 14 of the Standards of Apprenticeship (Supervision of Apprentice). Upon mutual agreement of the Employer and the Union, an apprentice may be able to bid a shift in the mechanic classification.

The Employer agrees to twice a year shift bidding. The change is to be effective on the first day of the first full pay periods in April and October. The Employer has the right to establish the number of positions by classification per shift. For purposes of shift bidding, seniority will be determined on the basis of length of employment within classification.

New employees may have their shift assigned for up to three (3) months for the purposes of skill building and training, to include but not limited to familiarization of equipment, policies, procedures, and staff. This training period will be reviewed every 30 days with the Union, supervisor, and floor staff.

Newly created positions will be bid at the time of opening or as soon as possible.

The exceptions to shift bid will be "normal" training or special scheduling.

The Employer has the right to control the work force in its entirety; however, any alteration from the shift bid will be submitted to the Union for review.

## ARTICLE 28- WAGES

Employees covered by this Agreement shall be compensated in accordance with the applicable wage scheduled specified in the Appendix of this Agreement. The wage scheduled shall be considered part of this Agreement.

Wage Increases Include:

2014: 1.85% General Wage Adjustment

2015: 1.85% General Wage Adjustment

2016: 2.00% General Wage Adjustment

## **ARTICLE 29- SAVINGS CLAUSE**

It is the intention of the parties hereto to comply with all applicable provisions of the state and federal law, and they believe that each and every part of this Agreement is lawful. All provisions of this Agreement shall be complied with unless any of such provisions shall be declared invalid or inoperative by a court of final jurisdiction. Should any provision of this Agreement or the application of such provision be rendered or declared invalid by any court action or by reason of any existing or subsequently enacted legislation, the remaining portions of this Agreement shall remain in full force and effect. Either party may request re-negotiation of invalid provisions for the purpose of adequate and lawful replacement thereof.

## ARTICLE 30- DURATION OF AGREEMENT

This Agreement, when adopted by the Transit Authority of Intercity Transit and approved by the Union, shall become effective as of January 1, 2014 and shall remain in effect until December 31, 2016 subject to the following provisions:

Letters of Understanding. In recognition of the possibility that changes may be necessary for the mutual benefit of the parties during the life of the Agreement, either party may initiate discussion of modifications by written communication to the other. The party receiving such communication shall arrange to meet with the other party within thirty (30) days of receipt. Should agreement be reached, the modification shall be attached as supplemental letter of understanding to this contract and shall remain in effect for the life of this Agreement.

AGREED TO THIS 16<sup>th</sup> DAY OF January 2014.

### INTERCITY TRANSIT



Martin Thies  
Authority Chair



Ann Freeman-Manzanares  
General Manager



Karl Shenkel  
Maintenance Director



Dan McMillan  
Maintenance Supervisor

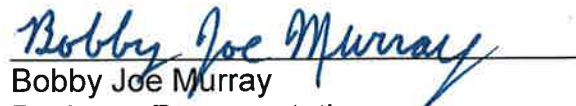


Heather Stafford Smith  
Human Resources Director



Christine DiRito  
Senior HR Analyst

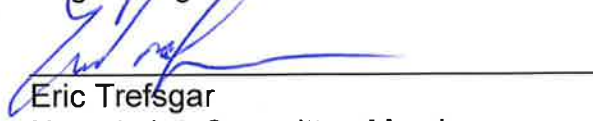
### INTERNATIONAL ASSOCIATION OF MACHINISTS & AEROSPACE WORKERS, AFL-CIO, DISTRICT LODGE 160



Bobby Joe Murray  
Business Representative



Chris Alfonso  
Negotiating Committee Member



Eric Trefsgar  
Negotiating Committee Member



JR Pettit  
Negotiating Committee Member



Aaron Rollins  
Negotiating Committee Member

## APPENDIX A - WAGE SCHEDULES

### JULY WAGE INCREASES:

Employees who are not at their top wage step as of July 1 of the applicable Contract year, shall receive a one step increase effective the first full pay period after July 1 of said year.

### LEAD PAY AND TEMPORARY OUT-OF-CLASS PAY:

Employees shall receive ninety cents (\$0.90) per hour above their straight time hourly rate of pay when working as a lead or when working out of class.

### APPRENTICE WAGE SCHEDULE:

Apprentice wage rates shall be in accordance with the following schedule (all rates are calculated as a percentage of the third step from the top of the Mechanic wage schedule, above):

- 1st 6 months - 60% of Journeyman Scale
  - 2nd 6 months - 65% of Journeyman Scale
  - 3rd 6 months - 70% of Journeyman Scale
  - 4th 6 months - 75% of Journeyman Scale
  - 5th 6 months - 80% of Journeyman Scale
  - 6th 6 months - 85% of Journeyman Scale
  - 7th 6 months - 90% of Journeyman Scale
  - 8th 6 months - 95% of Journeyman Scale
- Thereafter, Mechanic wage schedule beginning at third step from the top

Apprentice wage rates for each employee will be adjusted to be effective in the first full pay period after completion of each six months of service.

### TECHNICIAN 1 WAGE SCHEDULE:

A Technician 1 shall be hired at a starting wage rate which is ninety percent (90%) of the current Step A of the Technician wage. One year thereafter, the Technician 1 employee shall advance to a wage rate which is nine-five percent (95%) of the current Step A of the Technician wage. On the second anniversary of the Technician 1 employee's hire date, the employee shall advance to a wage rate which is equal to the current Step A of the Technician wage and thereafter progress through wage schedule as any other employee in the Technician classification.

## WAGE TABLE

		2014	2015	2016
--	--	------	------	------

Technician		1.85%	1.85%	2.00%
A		\$ 26.04	\$ 26.53	\$ 27.06
B		\$ 27.34	\$ 27.84	\$ 28.40
C		\$ 28.69	\$ 29.22	\$ 29.81
D		\$ 30.20	\$ 30.76	\$ 31.37

Support Specialist		1.85%	1.85%	2.00%
A		\$ 21.39	\$ 21.79	\$ 22.22
B		\$ 22.46	\$ 22.87	\$ 23.33
C		\$ 23.55	\$ 23.98	\$ 24.46
D		\$ 24.74	\$ 25.20	\$ 25.70

Service Worker		1.85%	1.85%	2.00%
A		\$ 18.99	\$ 19.34	\$ 19.72
B		\$ 19.89	\$ 20.26	\$ 20.66
C		\$ 20.89	\$ 21.28	\$ 21.70
D		\$ 21.95	\$ 22.36	\$ 22.80

Vehicle Cleaner		1.85%	1.85%	2.00%
A		\$ 17.07	\$ 17.39	\$ 17.73
B		\$ 17.92	\$ 18.25	\$ 18.61
C		\$ 18.81	\$ 19.16	\$ 19.54
D		\$ 19.71	\$ 20.07	\$ 20.47

Cleaner		1.85%	1.85%	2.00%
A		\$ 16.22	\$ 16.52	\$ 16.85
B		\$ 17.01	\$ 17.32	\$ 17.67
C		\$ 17.85	\$ 18.18	\$ 18.55
D		\$ 18.71	\$ 19.06	\$ 19.44

AGREEMENT

Between

INTERCITY TRANSIT

of

OLYMPIA, WASHINGTON

and

AMALGAMATED TRANSIT UNION

LOCAL 1765

AFL-CIO

for the period

JANUARY 1, 2015 THROUGH DECEMBER 31, 2017

*PRINTED ON RECYCLED PAPER*

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**AGREEMENT**

Between

**INTERCITY TRANSIT  
of  
OLYMPIA, WASHINGTON**

and

**AMALGAMATED TRANSIT UNION  
LOCAL 1765  
AFL-CIO**

**PREAMBLE**

THIS AGREEMENT made and entered into this 1st day of January 2015, by and between INTERCITY TRANSIT, Olympia, Washington, hereinafter known as the Employer, and the AMALGAMATED TRANSIT UNION, LOCAL 1765, AFL-CIO, hereinafter known as the Union.

## ARTICLE 1 – RECOGNITION

- A. The Employer recognizes the Union as the appropriate collective bargaining representative for coach operators, van operators, dial-a-lift dispatch specialists, and customer service representatives working in classifications listed in Appendix A and Appendix B of this Agreement.

Van Operator shall be defined as those employees operating vehicles less than 25 feet in length and having a passenger seating capacity of 19 or less; provided however, it is agreed that the 25 feet in vehicle length refers to the dimensions of the body design of the vehicle exclusive of bumpers; and that in the interests of safety, vehicle protection devices (for example Help bumpers) may be installed by the Employer as long as the body design does not exceed 25 feet in length.

- B. It is further agreed that supervisors and confidential employees are specifically excluded. Supervisory and confidential personnel will not perform bargaining unit work when bargaining unit employees are available; provided however, it is understood that the supervisory or confidential personnel of the Customer Services Division or the Dial-A-Lift Division will perform bargaining unit work. The Employer agrees not to use supervisory or confidential personnel for the purpose of avoiding overtime costs.
- C. The Employer agrees to meet and deal with the duly accredited representatives of the Union on all questions arising between the Employer and the Union.
- D. The Union agrees to notify the Employer in writing of the duly accredited representatives and committees representing the Union immediately upon their election or appointment to such offices.

## ARTICLE 2 - UNION SECURITY

- A. All employees within the scope of this Agreement shall become members of the Union within thirty (30) days from the date of certification of successful completion of training and shall remain members in good standing as a condition of continued employment with the Employer. The Employer agrees to provide each new employee with written notice of the provisions of this Section of the Agreement within five (5) days from the date of certification and further, to furnish a copy of such written notice to the Union.
- B. Upon receipt of a written, signed authorization, the Employer will deduct, in the manner provided by law, union dues and assessments from wages of employees working under this Agreement. The amount so deducted shall be mailed to the Union each month.
- C. Objections by any employee to joining the Union which are based on bona fide religious tenets or teaching of a church or religious body of which an employee is a member shall be observed. Any such employee shall pay an amount equal to regular union dues and fees to a non religious charity or to another charitable organization mutually agreed upon by such employee and the Union. The employee shall furnish written proof to the Union that such payment has been made. If the employee and the Union do not reach agreement on the recipient of this payment, the Department of Labor and Industries shall designate the charitable organization.
- D. The Union agrees to defend, indemnify, and hold the Employer harmless against any and all claims, suits, orders, or judgments brought or issued against the Employer as a result of any action taken or not taken by the Employer under the provisions of this Article.

### ARTICLE 3 - UNION ACTIVITIES

- A. The Employer agrees that no employee will be discriminated against because of their affiliation or activity in the Union.
- B. No Union member or officer shall conduct any Union business on Employer time.
- C. The Employer agrees to permit duly authorized representatives of the Union to have access to the Employer's premises for the purpose of adjusting grievances or conferring with other Union members, subject to security regulations, provided that such representatives obtain advance permission from the Employer's General Manager or the General Manager's designee, notifies the General Manager or the General Manager's designee of the reason for their presence, and does not interfere with normal operations.
- D. An employee elected to or appointed to a full-time Union office shall, upon written request to the Employer, be granted a leave of absence without pay for the purpose of fulfilling the duties of their elected or appointed office.

Such leave of absence shall be subject to the following provisions:

1. An employee shall accrue seniority during the leave of absence and shall be reinstated to their former position with the Employer upon completion of the employee's term of office.
2. An employee shall continue to accrue sick leave hours and vacation leave hours as though they were still an active employee. The full cost of all wages and benefits will be reimbursed on a monthly basis.
3. If permitted by State and/or Federal law, the Union and/or the employee shall be allowed to make contributions to Employer sponsored retirement plans, such as the Washington State Public Employees' Retirement System, the ICMA 457 Plan, and the 401(k) Retirement Plan, in accordance with the plans' rules and regulations. In such cases, such leave of absence may be designated as paid leave when agreement is made in cases where the Employer is reimbursed monthly by the Union and/or the employee for salary, retirement contributions, and any other related costs incurred by the Employer. It is understood that the Employer shall not make nor be held liable for any portion of the allowed contributions.
4. If permitted by the Employer's insurance carrier, the Union and/or the employee shall be allowed to continue health insurance coverage in accordance with the insurance carrier's rules and regulations and the Employer shall be reimbursed monthly for the total cost of the premium; the Employer shall not be held liable for any portion of the premium cost for said health related insurance.

Further, the Union and/or the employee shall indemnify and hold the Employer harmless from any and all claims or suits made against any insurance carrier regarding disagreement with said carrier relating to a claim and/or coverage.

5. Except as specifically addressed in this Section, the employee shall not be eligible to apply for nor receive any other Employer provided benefits during such a leave of absence.



## **ARTICLE 4 - UNION BULLETIN BOARD**

The Employer agrees that the Union may maintain a bulletin board for their exclusive use where notices pertaining to meetings, social events, and information of general interest to Union members may be posted. The Employer agrees to provide said bulletin boards. It shall be the responsibility of the Union and its representative to assure that information posted on such board is "Union Business". One bulletin board will be located in the operator entrance at the Pattison Street facility. The second will be located upstairs at the Olympia Transit Center.

## **ARTICLE 5 - COPE CHECK-OFF LANGUAGE**

The Employer agrees to deduct and transmit to the treasurer of the Amalgamated Transit Union Local 1765 for transmission to the Amalgamated Transit Union Committee on Political Education, (ATU-COPE), the amounts specified by each employee from the wages of those employees who voluntarily authorize such contributions on the forms provided for that purpose by the ATU-COPE. These transmittals shall occur semi-monthly or monthly and shall be accompanied by a list of the names and social security numbers of those employees and for whom such deductions have been made and the amount deducted for each such employee.

## **ARTICLE 6 - STRIKES AND WORK ACTIONS**

There shall be no strikes, work stoppages, slowdowns, picketing, lockouts, or any other restriction of work during the term of this Agreement.

The Union recognizes and agrees that disciplinary action, including discharge, may be taken by the Employer at its discretion against any employee or employees engaged in a violation of this Article. Such disciplinary action may be undertaken selectively at the option of the Employer and shall not preclude or restrict recourse to any other remedies which may be available to the Employer.

## ARTICLE 7 - RIGHTS OF THE PARTIES

- A. Except as otherwise expressly and specifically limited by the terms of this Agreement, the Employer retains all its customary, usual and exclusive rights, decision making prerogatives, functions, and authority connected with or in any way incidental to its responsibility to manage the affairs of INTERCITY TRANSIT or any part of INTERCITY TRANSIT. The Employer retains all prerogatives, functions, and rights not specifically limited by the terms of this Agreement.

The Employer shall have no obligation to negotiate with the Union with respect to any such subjects or the exercise of its discretion and decision making with regard thereto, any subjects covered by the terms of this Agreement and closed to further negotiations for the terms hereof, and any subject which was or might have been raised in the course of collective bargaining, but is closed for the term hereof.

- B. Without limitation, but by way of illustration, the exclusive prerogatives, functions, and rights of the Employer shall include the following:
1. To direct and supervise all operations, functions, and policies of INTERCITY TRANSIT in which the employees in the bargaining unit are employed.
  2. To close or liquidate an office, branch, operation or facility or combine the work of divisions, offices, branches, operations or facilities for budgetary or other reasons.
  3. To determine the need for a reduction or an increase in the work force and the implementation of any decision with regards thereto.
  4. To establish, revise, and implement standards for hiring, classifications, promotion, quality of work, safety, materials, equipment, uniforms, appearance, methods and procedures. It is jointly recognized that the Employer must retain broad authority to fulfill and implement its responsibilities and may do so by oral or written work rule, existing or future.
  5. To implement new, and to revise or discharge, wholly or in part, old methods, procedures, materials, equipment, facilities, and standards.
  6. To create shifts, workdays, and hours of work and work locations.
  7. To designate and to assign all work duties.
  8. To introduce new and revise existing duties within the unit.
  9. To determine the need for and the qualifications of new employees, transfers, and promotions.
  10. To discipline, suspend, demote, or discharge an employee.

11. To determine the need for additional educational courses, training programs, on-the-job training, and cross-training and to assign employees to such duties for periods to be determined by the Employer.
- C. The rights of employees in the bargaining unit and the Union hereunder are limited to those set forth in this Agreement.
- D. The exercise of any management prerogative, function, or right which is not specifically modified by this Agreement is not subject to the grievance procedure, to arbitration, or, as set forth above, to bargaining during the term of this Agreement.

## ARTICLE 8 - GRIEVANCE PROCEDURE

- A. Purpose: The purpose of this procedure is to provide an orderly method for resolving grievances. A determined effort shall be made to settle any such differences at the lowest possible level in the grievance procedure, and there shall be no suspension of work or interference with the operations of the Employer.

Prior to formal grievance procedures starting, the Employer and the Union will meet to define the issue under question by sharing information and will attempt to resolve the issue. This guideline will be used at each level of the formal grievance.

- B. Time Limits: Any and all time limits specified in the grievance procedure may be waived by written mutual agreement of the parties.

Failure of the employee or the Union to submit the grievance in accordance with the time limits specified without such waiver shall constitute abandonment of the grievance. If the Employer fails to meet or answer the grievance in accordance with the time limits specified without such waiver the grievance shall immediately advance to the next step in the grievance process.

A grievance may be terminated at any time upon receipt of a signed statement from the Union stating the matter has been resolved.

- C. Definition and Steps: For the purpose of this Agreement, a grievance is defined as only those disputes involving the interpretation, application, or alleged violation of any provision of this Agreement. Grievances shall be processed in accordance with the following procedures within the stated time limits.

### STEP 1: Department Director

In the event of any dispute or grievance involving the true interpretation of this Agreement, the matter shall first be submitted in writing within fifteen (15) calendar days of the occurrence of the event which gives rise to the grievance by the individual affected or through their Shop Steward, to the employee's department director, or the director's designee.

The employee's department director, or the director's designee, shall attempt to satisfactorily settle the grievance within fifteen (15) calendar days from the date of receipt of the employee's Step 1 grievance. No grievance shall be settled without the knowledge of the Shop Steward.

Step 1 will include the following:

- a. statement of the grievance and relevant facts;
- b. the specific provision(s) of the Agreement violated; and
- c. the remedy sought.

### STEP 2: General Manager

In the event the grievance cannot be settled at the Step 1 level as defined above, it shall be submitted in writing within fifteen (15) calendar days from the date of the department director's, or the director's designee's, Step 1 reply, by the Shop Steward to the Employer's General Manager and the Business Agent of the Union.

The written submission of a Step 2 grievance shall include the reasons for dissatisfaction with the department director's, or the director's designee's, solution.

The Employer's General Manager shall attempt to satisfactorily settle the grievance within fifteen (15) calendar days from the date of receipt of the Step 2 grievance. The General Manager and the Union Representative will try to jointly agree to settle or abandon the grievance at this step. If no agreement is reached they will decide whether to submit the grievance to mediation, expedited arbitration or formal arbitration as defined below.

PERC MEDIATION SERVICES: In the event the grievance is not settled at the Step 2 level as defined above, the written grievance may be submitted to mediation through the Public Employment Relations Commission (PERC) within fifteen (15) calendar days from the date of receipt of the Step 2 response. Both the Employer and the Union must agree to utilize PERC mediation services. If there is no agreement, either party may submit the grievance to arbitration in accordance with Step 3 as defined below.

In the event the grievance is submitted to mediation and the recommendations of the mediator are not acceptable to either party, either party may request arbitration in accordance with Step 3 as defined below.

### STEP 3: Arbitration

In the event that such dispute cannot be settled at the Step 2 level, as defined above, or through mediation, the written grievance may be submitted to arbitration within 30 days. Unless the parties mutually agree to the expedited arbitration process, the formal arbitration process will be used.

#### a. Formal arbitration

1. The party requesting arbitration of the question or questions in dispute shall request the Director of the Federal Mediation and Conciliation Service, Washington, DC to submit a list of seven (7) qualified arbitrators from the states of Washington and Oregon. Upon mutual agreement of both parties, PERC may be requested to provide a list of arbitrators in lieu of the FMCS.
2. The Employer and union will meet within fifteen (15) calendar days to select a single arbitrator from the list either by mutual agreement or by alternately striking candidates until one remains.
3. It shall be the function of the Arbitrator to hold a hearing at which the parties may submit their cases concerning the grievance. The hearing shall be kept private, and shall include only such parties in interest, designated representatives, and witnesses. The power of

the Arbitrator shall be limited to interpreting this Agreement, determining if the disputed Article or portion thereof has been violated, and prescribing an appropriate remedy.

b. Expedited Arbitration

1. The party requesting arbitration of the question or questions in dispute shall request the Washington Public Employment Relations Commission to submit a list of seven (7) names from the Dispute Resolution Panel as provided in WAC 391-55-120.
2. The Employer and union will meet within fifteen (15) calendar days to select a single arbitrator from the list either by mutual agreement or by alternately striking candidates until one remains.
3. It shall be the function of the Arbitrator to hold a hearing at which the parties may submit their cases concerning the grievance. The hearing shall be kept private, and shall include only such parties in interest, designated representatives, and witnesses. Further, in the Expedited Arbitration process, the following rules shall apply:
  - (a) The hearing shall be informal.
  - (b) No post-hearing briefs shall be filed.
  - (c) There will be no formal rules of evidence during the hearing.
  - (d) Each party will have one (1) hour to present its case and one-half (½) hour for rebuttal.
  - (e) The total length of the hearing will be completed within four (4) hours.
  - (f) The arbitrator may issue a “bench decision” at the conclusion of the hearing, but in any event shall render a decision no later than three (3) business days after the conclusion of the hearing.

c. Arbitration Procedures and Scope of Arbitrator’s Authority

1. The power of the arbitrator shall be limited to interpreting this agreement, determining if the disputed Article or portion thereof has been violated, and prescribing an appropriate remedy.
2. The Arbitrator shall have no authority to alter, modify, vacate or amend any terms of this Agreement or to substitute its judgment on a matter or condition for that of the Employer where the Employer has not negotiated and limited its authority on the matter or a majority thereof, within these stated limits shall be final and binding upon the parties to the grievance provided the decision does not involve action by the Employer beyond its jurisdiction.

3. Neither the Arbitrator nor any other person or persons involved in the grievance procedure shall have the power to negotiate new agreements or to change any of the present provisions of this Agreement.
4. Each party shall bear the expense of its own arbitrator and all costs of preparing and presenting its own case, including compensating its own representatives and witnesses. The fees and expenses of the arbitrator and the proceedings shall be borne equally by the parties. If one party requests a record of the proceedings, that party shall solely bear the cost of such record. If both parties desire a copy of the proceedings, the parties shall equally share the cost of a record of the proceedings.
5. In case of a grievance involving any continuing or other money claim against the Employer, no award shall be made by the Arbitrator which shall allow any alleged accruals prior to the beginning date of the bid period prior to the bid period when the grievance was filed.
6. The grievance procedure provided herein, including mediation and/or arbitration, shall constitute the sole and exclusive method of determination, decision, adjustment or settlement between the parties of the subject grievance as herein defined.
7. In the event the Arbitrator finds that it has no authority or power to rule in the case, the matter shall be referred back to the parties without decision or recommendation on the merits of the case.

## ARTICLE 9 – DISCIPLINE

### Definitions: Active for Work

For purposes of this Article “active for work” is defined as: All paid time being credited towards the specified period of time with the following exceptions:

1. Sick leave used to supplement a medical leave without pay beyond ten (10) consecutive calendar days will not be considered active for work.
2. Sick leave used to supplement an on-the-job injury beyond ten (10) consecutive calendar days will not be considered active for work.
3. Leave of absence without pay beyond ten (10) consecutive calendar days will not be considered active for work.
4. Time off from work due to an on the job injury will not be considered active for work.

### A. Determining Level of Discipline

The Employer will determine the level of discipline for violations of Intercity Transit Policy.

### B. Initiating Discipline

When the Employer is made aware of an incident or infraction that may result in an assessment of discipline, the Employer will do one of the following within fifteen (15) calendar days when the employee is “active for work”:

1. Discipline the employee for the incident or infraction; or
2. Notify the employee in writing that the incident or infraction is being investigated and could result in disciplinary action upon completion of the Employer’s investigation. The Employer’s investigation will be completed no more than thirty (30) days from the date the Employer is made aware of an incident or infraction. The timeline will be extended if a third-party investigation (e.g., police or other public safety agency) prohibits completion of the internal investigation. This timeline may be extended by mutual agreement.

The limits will not include any time the employee is not active for work due to sick leave (paid or unpaid) or vacation leave.

### C. Scheduling Union Representation at Discipline Meetings

When a meeting with an employee has been requested by the Employer, and where there may be discipline involved, it is agreed that it is the responsibility of the affected employee to request representation from their Shop Steward. If a Shop Steward is requested, the meeting will be scheduled for the next day, if necessary. If relief is required, it is the responsibility of the Shop Steward to request time-off.



#### D. Changing Disciplinary Status

The employee's disciplinary status at the Written Warning level and above can be changed by both the passage of time and whether the employee commits additional violations.

##### Disciplinary Practice Governed by the Discipline Guide

1. Disciplinary action shall normally be as provided in the "Discipline Guide" which is attached to this *Agreement* as Appendix C, Discipline Guide.
2. Customer Service Representative: The Employer and the Union agree that the Attendance/Late Report Policy signed on November 30, 1999 will remain in effect for Customer Service Representatives.

#### E. Employee Mandatory Assessment

When an employee receives a Category A or B discipline which does not result in the employee's termination, or when the employee receives a Category C Decision-Making Leave discipline, the employee may be required to attend and participate in a mandatory assessment. The assessment provider (the Employer's medical representative or employee assistance representative) will be paid for and determined by the Employer.

Failure or refusal by an employee to participate and/or complete a treatment regimen or program as prescribed or recommended by the assessment provider shall be considered insubordination.

#### F. Reviewing Disciplines on File

An employee has the right to review both the personnel file maintained by Human Resources and the working file maintained by his/her Department.

#### G. Discipline Copies to Union

The Employer will send copies of any written discipline placed in an employee's file to the Union office.

#### H. Appealing Discipline

Except as provided herein, Written Warnings can be grieved up to the General Manager. If the parties fail to agree, the Written Warning will remain in the file. The Union may attach a statement of their position to the written warning.

A Written Warning issued as a result of a category B violation may be taken to mediation and/or arbitration as described in Article 8 of this agreement.

An employee cannot be disciplined without cause. An Employee may appeal his/her suspension or dismissal through the grievance procedure. For purposes of this Article, "Decision-Making Leave" is considered a form of suspension.

An employee serving in their initial probationary period may be dismissed within the probationary period with no appeal of the dismissal. It is understood however, that a probationary employee has all rights to the grievance procedure for all other actions. Probationary employees may request union representation at a dismissal hearing.

## ARTICLE 10 - PROBATION, RECLASSIFICATION, SENIORITY, AND REDUCTION IN FORCE

### A. PROBATION AND RECLASSIFICATION

An employee shall serve an initial probationary period consisting of six (6) consecutive months.

Employees must be in an active work status to volunteer for re-classification. Any changes in reclassification will not change the employee's beginning date of accrual for vacation leave, sick leave, or floating holiday leave.

Any employee, moving from one represented position to another represented position, will be placed in the wage schedule at the wage rate higher, but closest to, their current wage rate when possible.

#### 1. Reclassification Operator to Operator:

- a. If the Employer reclassifies an Operator to a different Operator classification, the employee shall be required to serve a three (3) month evaluation period and the employee's evaluation period will end on the first day of the first pay period following the completion of the three (3) month evaluation period.
- b. An Operator who volunteers for reclassification may not elect to reclassify to their prior operator status if they have completed their three (3) month evaluation period. The Employer has the right to return an employee to his/her Operator position anytime during the three (3) month evaluation period if the Employer determines the employee's performance is unsatisfactory.
- c. The Employer may not require, except when a reduction in force requires such reclassification, an employee to accept a reclassification, from Van Operator to Coach Operator or from Coach Operator to Van Operator, unless the employee is in agreement with the reclassification.
- d. When an employee receives a reclassification from Van Operator to Coach Operator, the employee will be placed in the Coach Operator wage schedule at the wage rate higher, but closest to, their current Van Operator wage rate. The employee's anniversary date for future Coach Operator wage rate increases will be based on the employee's anniversary date as a Van Operator.
- e. When an employee reclassifies from Coach Operator to Van Operator, the employee will be placed in the Van Operator wage schedule at wage rate they would have been in had they been a Van Operator from the day they entered the bargaining unit.
- f. Coach Operators temporarily assigned to van services will be paid per the provisions of the wage rates in Appendix A for Coach Operator classifications

- g. Operators who volunteer for reclassification, accept the reclassification, enter training and then decide to reclassify to their previous classification, will have to wait two years from that decision date before they can volunteer for another reclassification.

2. Reclassification to Dial-A-Lift Dispatch Specialist:

An Operator or Customer Service Representative who volunteers for reclassification to a Dial-A-Lift Dispatch Specialist position may elect to reclassify to their prior status during their evaluation period. The Employer has the right to return an employee to his/her Operator or Customer Service position anytime during the six (6) month period.

3. Reclassification to Customer Service Representative:

- a. If the Employer reclassifies an Operator to the status of a Customer Service Representative, the employee shall serve a three (3) month evaluation period as a Customer Service Representative.
- b. An Operator who volunteers for reclassification to a Customer Service Representative position may not elect to reclassify to their prior Operator status if they have completed their three (3) month evaluation period. The Employer has the right to return an employee to his/her operator position anytime during the three (3) month evaluation period if the Employer determines the employee's performance is unsatisfactory.

B. SENIORITY

1. An employee shall lose all seniority credit in the event of voluntary or involuntary termination.
2. An employee shall accrue seniority for job bidding purposes for any authorized leave of absence without pay other than medical leave, provided such leave of absence does not exceed sixty (60) calendar days.
3. An employee shall accrue seniority for any authorized medical leave of absence without pay provided such leave of absence does not exceed twelve (12) calendar months.
4. It is understood that employees accepting non-represented positions with the Employer will be considered non-represented employees and will be subject to all of the Employer's employment rules and regulations as addressed in the Employer's Human Resources Rules. The employee may leave the non-represented position and return to their bargaining unit position under the following conditions:
  - a. During the first three (3) months in the non-represented position the employee may voluntarily elect to return to their bargaining unit position without loss of seniority for

the position previously occupied; provided the employee has not violated the Employer's rules and regulations as addressed in the Employer's Human Resources Rules.

- b. After completion of the first (3) three months in the non- represented position, the employee may not elect to return to their bargaining unit position.
- c. During the first (6) six months in the non- represented position the Employer may return the employee to the employee's former bargaining unit position. If the employee returns during the six month non- represented probation period as defined in the Employer's Human Resources Rules, the employee will not lose seniority for the bargaining unit position previously occupied.
- d. Any Employee returning to the bargaining unit after the six month non-represented probation period will assume the position of least seniority in their former classification.

5. Operator Seniority:

- a. There shall be two types of seniority:
  - i. Seniority for purposes of layoff and recall shall be determined by the date of hire. All applications for employment shall be time/date annotated upon receipt. The chronological order of applications will determine the seniority order for employees hired on the same day.
  - ii. Seniority for purposes of bidding shall be determined by the length of service the employee has in his/her job classification.
- b. New employees will be assigned the next open seniority number in their job classification (Coach, Van) upon start of training and will retain this ranking throughout their term of employment in this job.
- c. When employees change classification, they will assume the next open seniority number in their new classification. They will retain their date of hire as an operator for the purpose of determining reduction in force or recall to work. Coach Operators, who reclassify to Van Operators under the provisions of A.1.b above, will return to their previous seniority.

6. Dial-A-Lift Dispatch Specialist Seniority:

- a. Seniority for purposes of layoff and recall shall be determined by the date of hire as a Dial-A-Lift Dispatch Specialist. All applications for employment shall be time/date annotated upon receipt. The chronological order of applications will determine the seniority order for new employees hired on the same day.
- b. If more than one Specialist is hired on the same day, and one of the employees is a current Intercity Transit employee, the current employee will be given the higher

seniority status. If two current employees are hired on the same day, the employee with the earliest Agency date of hire will be given the higher seniority status.

7. Customer Service Representative Seniority:

- a. Seniority for purposes of work shift and vacation bidding shall be determined by the length of service the employee has in the Customer Service Division. New employees will be assigned the next open seniority number upon start of training and will retain this ranking throughout their term of employment in this job.
- b. Seniority for a Customer Service Representative position (lead and non-lead classification) shall be defined by the length of continuous service as a Customer Service Representative and be determined by the date upon which the employee became classified as a Customer Service Representative.
- c. In the event that the Employer hires more than one Lead Customer Service Representative, the Lead Customer Service Representatives will have separate work shifts from the other Customer Service Representatives. Seniority for bidding on these shifts will be based on length of service as a Lead Customer Service Representative.
- d. When employees change classification, they will assume the next open seniority number in their new classification but will retain their original date of hire position\_date in the division for the purpose of determining reduction in force or recall to work.
- e. Seniority for purposes of layoff and recall shall be determined by the date of hire in the Customer Service Division. All applications for employment shall be time/date annotated upon receipt. The chronological order of applications will determine the seniority order for employees hired on the same day.

C. REDUCTION IN FORCE

1. When forces are reduced, employees will be laid off in the inverse order of their date of hire within their classification (operator, DAL dispatch specialist, customer service representative). Employees having the same date of hire will be laid off in the inverse order of their seniority that was in effect at the time their initial probationary period was completed. The Employer agrees to consult with the Union prior to any layoffs. An employee who came from another Intercity Transit position to Dial-A-Lift may return to their prior position if available but would not retain their seniority rights after the initial six (6) month probation period. An employee who came from the operator ranks to Customer Service may return to the operator ranks if a position is available but would not retain their seniority rights after the initial three (3) month evaluation period.
  - a. If the reduction in force requires that the number of Coach Operators be reduced, the employees laid off will be based on date of hire and Coach Operators may be required to return to a van assignment. Coach Operators who return to a van assignment will maintain their coach wage rate at the time of the reassignment. The wage rate will stay at that level until the van wage rate catches up to their wage rate. The Coach Operator

returned to a van assignment will return to a seniority position based upon their date of hire as an Operator.

- b. If Coach Operators are the employees with least seniority and are laid off, and additional Coach Operators are needed, the Van Operators will be given an opportunity in seniority order to volunteer for promotion to Coach Operator status. If an inadequate number of Van Operators volunteer for the coach positions, Van Operators will be assigned to coach status in reverse seniority order.
2. Employees shall be recalled in the reverse order of layoff as provided in Item 1. above and provided that the employee can do the available work. Employees reentering their job classification will suffer no penalty in bid seniority due to a reduction in force. Employees who had previously completed a probationary period will not be required to complete a new probationary period.

Coach operators who are required to return to a van assignment must return to coach work when it is available. Refusal to return to a coach assignment will result in a change in wage rate to the van rate based on their length of service. Recalled employees will suffer no bid seniority penalties upon recall.

3. Notice of recall shall be sent to the employee at their last known address by registered mail. If any employee fails to report for work within fifteen (15) calendar days from the date of mailing the notice of recall, they shall be considered to have quit, shall cease to have seniority, and shall have their name removed from the recall list.

However, if an employee's failure to report for work is on account of illness or injury, they may retain their seniority and recall rights if they have notified the Employer by registered mail and such notification is received prior to the deadline for their reporting to work. It is recognized that the Employer may require substantiation of the illness or injury. If the substantiation is not submitted promptly to the Employer, and if it is not to the satisfaction of the Employer, the loss of seniority and recall rights shall stand.

Recall rights for any employee shall expire eighteen (18) months from the date of layoff. Written notice of expiration of recall rights shall be sent to the employee at their last known address by registered or certified mail.

It shall be the responsibility of the Employer to maintain the recall list. It shall be the responsibility of the employee to keep the Employer informed of their current address.

4. Benefits shall not accrue during layoff.
5. Nothing in this Article or any part of this Agreement is intended to restrict the sole authority of the Employer to determine the financial necessity of service reduction, the form of the reduction, and the duration of the layoff.

## ARTICLE 11 - SELECTION OF JOBS

### A. Operator:

1. New Operators: All new Operators will be trained to do Coach and Van work with the choice of classification to be exercised by seniority prior to their first opportunity to bid. Operators who choose the Van Operator classification will be subject to the Van Operator Wage Schedule.

2. Coach Operators: All coach operators shall be able to select their jobs or extraboard positions in accordance with their bid seniority, provided the employee is qualified for the job or position for which they have bid. The coach extraboard will perform both coach and van extra work. An employee shall exercise their seniority right only once per bid.

If a coach operator is, or will be, on a paid or unpaid leave of absence or a medical related leave on the starting day of a new bid period, the operator is eligible to bid if a doctor can provide a specific return to work date during the bid period. If the operator cannot provide a specific return to work date that operator may not select a job. If the operator is later able to return to work during the bid period, the operator will be assigned to the extraboard in accordance with Article 12.A.2.

When an operator returns to work during a bid period and becomes assigned to the extraboard, the operator's extraboard assignment will be based upon the operator's seniority.

3. Van Operators: All van operators shall be able to select their jobs in accordance with their bid seniority, provided the employee is qualified for the job position for which they have bid. An employee shall exercise their seniority right only once per bid.

If a van operator is, or will be, on a paid or unpaid leave of absence or a medical related leave on the starting day of a new bid period, the operator is eligible to bid if a doctor can provide a specific return to work date during the bid period. If the operator cannot provide a specific return to work date that operator may not select a job. If the operator is later able to return to work during the bid period, the employee will select or be assigned open van work.

4. Selection of Jobs - The Employer shall post all full-time bid jobs, part-time bid jobs, driver paddles, changed schedules, and extraboard positions seven (7) calendar days prior to the start of the general bid selection. The Coach Operator bid will occur at the conclusion of the Van Operator bid. Any Van regular runs not bid by Van Operators will be available for bidding by Coach Operators. During the bidding period, the number of extraboard positions may be adjusted due to changes in the employee roster.

5. General Bid - General bid selections shall be completed at least seven (7) calendar days prior to job implementation. The Employer shall schedule up to fifty (50) percent of the eligible Van Operators and up to twenty (20) percent of eligible Coach Operators to bid each day at an appointed time. The Employer will notify an employee of their appointed bid time at time of job posting. Employees will have a minimum of 15 minutes to bid. An employee may bid in



person, by signed proxy, or by telephone or radio. The employee is responsible to contact the Employer within their appointed time in order to bid.

The employee shall bid by job number only, and the employee is responsible for understanding the contents of the job number. The Employer is responsible for providing accurate job contents at the time of job posting, and for providing accurate job number availability at the time of an employee's bid.

In the event an employee fails to bid at the appropriate date and time, the employee will bid after the last scheduled bid of that day and before the first scheduled bid of the next day. If the employee fails to bid by the first scheduled bid of the next day, their bid time will fall to the end of that day. This process continues to the end of the bid period.

6. Number of Bids - Jobs shall be posted at least three (3) times per year. The Employer shall set the schedule for bids to accommodate service changes. No more than 135 days shall elapse between bids except by mutual consent. All general bids shall proceed in accordance with the established bid procedures. Jobs working demand response will be identified at the time of bid. The end times of these runs may be subject to extension by up to 30 minutes. The intent is to assure that the unanticipated needs of demand response customers can be met. Demand response runs will be reviewed by the Employer and the Union prior to bid posting, to determine if the end times of any demand response runs should be adjusted for the next bid.
7. Modified or Canceled Jobs - When the Employer is made aware that a particular job(s) may be modified or canceled to coincide with the Legislative Session or other service considerations, it will be identified at the time of posting. If the job is modified, the affected operator may elect to work the modified schedule or go to the extraboard in accordance with their bid seniority for the duration of the bid.

If a change occurs or an error is discovered, which affects the job's report time or finish time by thirty (30) or more minutes on any one or more days, or which affects a job's weekly total hours or overtime by one hundred and fifty (150) or more minutes, without the notice at bid posting, an expedited new bid will take place provided there is more than thirty (30) days before the next bid is scheduled to go into effect.

8. Part-time Jobs - If only part-time jobs are left for bidding, the operator will have the option of bidding the work or going to the extraboard. Any unbid part-time job will be considered extraboard work and assigned on a daily basis.
9. New Operators: When new coach operators complete their training, there will be a rebid process by seniority. The bid will start with the operator following the last bid operator on the extraboard. The number of extraboard slots will be expanded as necessary to accommodate the total number of new employees. The bid operator may elect to keep their current job or select a vacant job to include extraboard slots. This bid process will not involve a "bump" process.

When new van operators complete their training, there will be a rebid process by seniority beginning at the first open van assignment. New van operators will select from the remaining open van assignments.

10. Vacated Jobs - Any job that has been vacated for any reason shall be worked by the extraboard for the duration of the bid.
11. Special Service Work - The Employer shall have the right to contract for special service work as determined in the best interests of the organization.
  - a. Special Service work shall be consistent with the definition contained in the Employer's Special Service Policy, to include, but not be limited to, the following characteristics:
    - i. Special Service shall be in operation on temporary routes for conventions, conferences, and other private events;
    - ii. The event must be sponsored by a local government agency or a non-profit organization and the Employer must be a participant;
    - iii. The organization wants exclusive use of the vehicle; service is private and not open to the public;
    - iv. Service will take place entirely within the Employer's service area; and
    - v. The Employer bills for the service.
  - b. The Employer will post a sign-up list for any operator who is interested in working the special service assignment. Selection for each assignment will be made on a strict seniority basis (combined coach and van) from among those who signed up. However, the following operators will not be eligible to sign-up:
    - i. Anyone whose shift overlaps with the hours of the special service assignment; and/or
    - ii. Anyone whose next shift reports less than eight (8) hours after the end of the special service assignment.
  - c. Sign-ups will be on a purely voluntary basis; no bargaining unit member will be forced to take this special service work. In the event there are no qualified bargaining unit volunteers, the Employer may assign non-bargaining unit employees to work the special service work.
  - d. The Employer agrees to provide supervisory personnel on-duty during the entire duration of the special service assignment.
  - e. The Employer agrees to a two (2) hour minimum guarantee for all special service assignments.

12. Reduced Service Bidding - The following procedures will be in effect for reduced service bidding:

- a. Reduced service may be implemented on the following days: Any Intercity Transit observed holiday, Martin Luther King Day, Presidents Day, Veterans Day, and the Friday after Thanksgiving. Other days may be added upon the prior mutual agreement of the parties.
- b. The level of service reduction for the year will be determined by the Employer and reviewed by the Union one (1) week prior to posting. The level of service reduction for the year will be posted at least one (1) week prior to the regular vacation bid.
- c. Operators will bid work by seniority via proxy forms. Those operators choosing not to work will still have to submit proxy forms designating whether they wish to use vacation time or leave without pay (guarantee time will not be paid if the employee chooses leave without pay). The bidding priority will be:
  - i. Operators normally scheduled to work (List A).
  - ii. Operators scheduled to be off work (List B).
  - iii. If there are not enough volunteers from List A and List B, operators will be assigned in inverse seniority from List A.

This assignment will close the seniority bid process.

If an operator chooses, they may volunteer to “undraft” an operator assigned a run on a “first come, first serve basis”, starting with the last operator “drafted”.

- d. Operators who are not scheduled to work and are asked to work will be paid in accordance with the Fair Labor Standards Act.

B. Dial-A-Lift Dispatch Specialist:

1. All Dial-A-Lift Dispatch Specialists shall be able to select their jobs in accordance with their job classification on a rotating basis, provided the employee is available to work the job or position within thirty (30) calendar days of the bid. If a Specialist is out on medical leave at the time of the bid, a doctor’s release stating the employee is likely to be released for duty within 30 days of the start of bid will be required in order to bid. An employee shall exercise their seniority right only once.
2. The Employer shall post all jobs a minimum of ten (10) calendar days prior to the start of the general bid selection. The Employer will notify an employee of their appointed bid time at time of job posting. General bid selections shall be completed at least seven (7) calendar days prior to job implementation.
3. In the event the employee fails to bid at their appointed date and time, the Employer shall assign a bid to the employee. Such assigned bid shall be as similar as possible to the

employee's current bid. An employee may bid in person, by signed proxy, or by telephone to the Employer.

4. Jobs shall be posted for general bid every 90 to 120 days. The Employer has the right to schedule additional general bids.
5. If a shift is canceled, the affected employee may displace any other employee with less seniority.
6. If an employee returns to work who was not eligible to bid at the previous general bid, they will be assigned the relief shift.
7. If a Dial-A-Lift Specialist terminates for any reason, and there are less than 30 days to the next regular bid, relief will cover the vacancy. If there are more than 30 days until the next regular bid, a displacement bid will take place. A displacement bid shall not constitute a general bid.
8. Probationary employees are not eligible to bid a shift unless qualified by prior experience or skill. Employees who have completed their probationary period, but who are not fully qualified to bid the Master Scheduler position, may be prohibited from bidding that position during the first general bid following the completion of their probationary period. A qualified employee must bid the Master Scheduler position. If the Master Scheduler position becomes open, a new bid will take place and a qualified employee will fill the position.
9. The Employer will hold an observed holiday work bid prior to the holiday for Dial-A-Lift Dispatch Specialist. Employees will be able to select their observed holiday work in accordance with their bidding seniority.

C. Customer Service Representative:

1. All Customer Service Representatives shall be able to select their jobs in accordance with their job classification (bid) seniority, provided the employee is available to work the job or position within thirty (30) calendar days of the bid. If a representative is out on medical leave at the time of the bid, a doctor's release stating the employee is likely to be released for duty within 30 days of the start of bid will be required in order to bid. An employee shall exercise their seniority right only once.
2. In the event that the Employer hires more than one Lead Customer Service Representative, the Lead Customer Service Representatives will have separate work shifts from the other Customer Service Representatives. Seniority for bidding on these shifts will be based on length of service as a Lead Customer Service Representative.
3. The Employer shall post all jobs seven (7) calendar days prior to the start of the general bid selection. The Employer will notify an employee of their appointed bid time of job posting. General bid selections shall be completed at least seven (7) calendar days prior to job implementation.

In the event a new shift option needs to be tested, the entire posting, bidding and implementation will be completed in a minimum of seven (7) calendar days.

4. In the event the employee fails to bid at their appointed date and time, the Employer shall assign a bid to the employee. Such assigned bid shall be as similar as possible to the employee's current bid. An employee may bid in person, by signed proxy, or by telephone to the Supervisor of Customer Service.
5. Jobs shall be posted for general bid two (2) times each calendar year. The Employer has the right to schedule additional general bids.
6. If a shift is canceled, the affected employee may displace any other employee with less seniority.
7. If an employee returns to work who is not eligible to bid at the previous general bid, they may displace any other employee with less seniority. Such returning employee shall be assigned a shift for up to fifteen calendar days or until a displacement bid is completed. Such displacement shall not constitute a general bid.
8. If a Customer Service Representative terminates for any reason, all employees with less seniority will be permitted to bid on the vacancy created. The vacant shift may first however, be assigned to a Customer Service Representative or qualified intern by the Supervisor for up to 30 calendar days. In the event that there is more than one shift opening available at the same time, all employees, beginning with the first affected employee will be eligible to bid on all open shifts. A displacement bid shall not constitute a general bid.
9. The Employer will hold an observed work holiday work bid at least once each calendar year, if needed, for all Customer Service Representatives. Employees will be able to select their observed holiday work in accordance with their bidding seniority.

## ARTICLE 12 - EXTRABOARD OPERATORS AND HOLD DOWNS

### A. EXTRABOARD OPERATORS

1. A single extraboard will be operated using Coach Operators. All work assignments left open by bid job operators or unassigned pieces of work shall be worked by the extraboard when available. Active extraboard operators shall have first right of refusal for this extra work; provided however:
  - a. overtime work for observed holidays shall be in accordance with the procedures defined under Article 14 - Personnel Benefits, C. Holiday Leave.
  - b. the Employer may offer work to part-time bid operators by seniority.
  - c. if no extraboard operator or part-time bid operator is available for open work, the work shall be offered by seniority to bid job operators who have signed up in the overtime book. If no extraboard operator is available and the overtime book is exhausted, the Employer may cover that work with any available operator.
2. Extraboard operators shall be granted two (2) regular days off per week. This shall be referred to as bid days off and will be selected by seniority. The bid days off shall remain in effect until another bid is held. The Employer shall determine the days off allotment posted for bid and may call a new days off bid when changing circumstances warrant.
3. If an extraboard operator is offered and accepts work on their bid day off, the overtime provisions of this Agreement will only apply for work performed in excess of forty (40) hours in the work week.
4. The Employer will post all active extraboard operators' work hours at the end of each week. The Employer will make every effort to equalize the active extraboard operator work hours on a two-week pay period (Sunday through Saturday) basis. Hours worked on an employee's day off will not count in the equalization calculation.
5. The Employer guarantees a minimum of forty (40) hours of work within the work week (exclusive of bid days off) to an extraboard operator; provided the extraboard operator is available for the work and accepts the work assignments.
6. Extraboard operators may be assigned other non-driving duties to maximize extraboard operators' hours and to meet the guarantee pay provisions as defined in this Agreement. Provided however, the Employer and the Union agree that if the non-driving assignment is maintenance in nature, the extraboard operator may decline the assignment.
7. The Employer will post work assignments for extraboard operators by 3:00 PM on the day preceding the work assignment. Every effort will be made to prevent any change of the scheduled work assignment beyond the 3:00 PM posting time. If an assigned run should

become open after the posting time, it will be assigned in accordance with Section A. 1. of this Article.

## B. HOLD DOWNS

1. For the purpose of this Agreement the following definitions shall apply:

A hold down is defined as any job or new bid assignment that is open for a full week (Sunday through Saturday), except for jobs that are bid as single days.

An active extraboard operator is any extraboard operator available for daily work assignments.

An inactive extraboard operator is any extraboard operator working a "hold down" assignment; such operator is not eligible for extra work assignments, except by overall seniority. (Extraboard internships - See Article 13.E.)

2. Extraboard operators bidding hold downs may bid by proxy for an available hold down. Bids shall be submitted no later than 3:00 PM on the Friday prior to the effective date of the hold down. Bids shall be awarded on a seniority basis. An extraboard operator awarded a hold down will be on inactive extraboard status and their hours worked will not be balanced with the active extraboard for the hold down week. The extraboard operator will automatically receive the days off of the hold down awarded and will be considered a bid job operator for pay purposes during the hold down.
3. Available hold down assignments will be posted on Monday by 10:00 AM and remain posted until 3:00 PM the following Friday. Any additional hold down assignments that become available between Monday and Friday noon will be posted as "late posting" and will be available for Friday's hold down bid. All hold downs become effective on the first day of the following work week.
4. Hold down bids will be awarded one week at a time. Results will be posted by 9:00 AM Saturday for the following work week. Hold downs not bid will be worked by the extraboard by way of daily work assignments.
5. An operator coming off a leave of absence shall reclaim their bid assignment at the beginning of the next pay week. In the interim the operator will be assigned to the extraboard with the operator receiving their regular bid days off. In the event the operator's bid assignment is not being worked by a hold down operator, they shall resume their bid assignment.

## **ARTICLE 13 - HOURS OF WORK, OVERTIME, SPREAD TIME, INCLEMENT WEATHER PAY, AND OTHER WORK ASSIGNMENTS**

### **A. HOURS OF WORK**

1. The work week shall commence at 4:00 AM Sunday and end at 3:59 AM the following Sunday, and shall contain two (2) scheduled days off. Scheduled meal times will not be less than thirty (30) minutes nor more than sixty (60) minutes.
2. Operator: Operators shall be paid the applicable straight time driving rate for regularly scheduled work shifts. All regular bid jobs of thirty- five (35) or more hours per week with a minimum of four (4) days of work in a seven (7) day work week will be paid for forty (40) hours.

The Employer guarantees that at least seventy-five (75) percent of all regular bid jobs will be subject to the forty (40) hour guarantee.

The Employer guarantees that at least fifty (50) percent of the part-time jobs (less than 35 hours per week) will consist of one-hundred (100) or more hours per calendar month. Such jobs will be paid only for the actual time worked and benefits will be prorated in accordance with Article 14 - Personnel Benefits, A. Proration of Benefits.

In developing jobs schedules, the Employer will endeavor to insure that at least fifty (50) percent of the regular full-time jobs are straight shifts.

Operators paid time shall commence at the time they are required to report at the garage and will terminate at the time indicated on their work paddle, exclusive of meal time.

3. Dial-A-Lift Dispatch Specialist and Customer Service Representative: Employees shall be paid for all scheduled hours worked and any additional hours worked as requested by the Employer. All regular bid jobs of thirty-eight (38) or more hours per week will be paid a minimum of forty (40) hours.

### **B. OVERTIME**

Compensation at the overtime rate of time-and-one-half the employee's regular hourly rate of pay, exclusive of any premium pay, shall be paid to employees within the bargaining unit under the following provisions:

1. For work performed in excess of forty (40) hours in the work week.

In computing overtime, hours of work include/exclude the following:

- a. Vacation leave shall be considered as hours worked;



- b. Sick leave shall not be considered as hours worked;
  - c. Observed holiday leave, if the leave occurs on the employee's regularly scheduled work day, shall be counted as hours worked;
  - d. Leave without pay (non-medical or medical) shall not be considered as hours worked; and
  - e. Time off for union business shall not be considered as hours worked, except that, time off for union officers and shop stewards conducting union business with the Employer will be considered as hours worked for overtime purposes.
  - f. Attendance at Employer committee or mandatory meetings, Employer approved or required training hours, and approved volunteer work assignment hours shall be considered as hours worked.
2. An employee working on an observed holiday shall be entitled to overtime pay for any worked hours on the holiday. The worked hours shall be counted towards the employee's overall work week and could result in additional overtime hours at the end of the work week.
3. Operator:
- a. In the event the full-time bid or extraboard operator works on their scheduled day off, a minimum of four (4) hours shall be paid in accordance with the Fair Labor Standards Act. Part-time bid operators working on their scheduled day off shall be paid for actual hours worked in accordance with the Fair Labor Standards Act.

Operators interested in working on their scheduled day off are responsible for submitting an overtime availability card for the Overtime Book. Operators may add or withdraw their name from the Overtime Book at any time. Operators who have requested work via the Overtime Book will be offered available work in seniority order. Operators may be drafted for work in inverse seniority if enough volunteers are not available.

- b. Work performed in addition to regularly scheduled jobs of thirty-five (35) or more hours per week will be paid at the overtime rate if the operator has worked the scheduled job for the week. This additional work will not offset guarantee time.

If the operator's scheduled job is not performed during the week due to sick leave, non-Employer union business, or leave without pay, the operator will be paid for the additional work in accordance with the Fair Labor Standards Act.

- c. Operators shall be paid for attendance at required group meetings before or after a full-time bid operator's regularly scheduled work shift which are called by the Employer and for which attendance is required. Payment for attendance at such required meetings for part-time bid operators and extraboard operators shall be made in accordance with the Fair Labor Standards Act.

In the event any required meeting is called on an operator's scheduled day off, the operator shall not be required to attend the meeting but may do so on a voluntary basis and shall be paid in accordance with the Fair Labor Standards Act. If an employee is on paid leave status, and chooses to attend a meeting, he/she will not be paid for more than their normal scheduled work day. Paid leave will be adjusted to complement time spent in the meeting to equal their normal work day.

The Employer may require attendance at group meetings of two (2) hours maximum duration. The Employer may hold up to six (6) group meetings in a calendar year.

4. Dial-A-Lift Dispatch Specialist and Customer Service Representative:

The employer has the right to call mandatory meetings to communicate essential information and ensure the smooth operation of the division. These meetings can include division and department meetings. The Supervisor will designate which meetings are mandatory. Employees on approved leave will be excused. The Supervisor may excuse an employee based on other circumstances.

An employee may be required to attend mandatory meetings on their day off. This would occur no more than three (3) times per year per individual. The employer would attempt to vary the days of the meeting to minimize the negative impact on an individual. An employee required to attend on their day off would be paid a minimum of 2 hours. Payment shall be made in accordance with the Fair Labor Standards Act. If an employee is on paid leave status, and chooses to attend a meeting, he/she will not be paid for more than their normal scheduled work day. Paid leave will be adjusted to complement time spent in the meeting to equal their normal work day.

5. Dial-A-Lift Dispatch Specialist Open Pieces of Work:

- a. The Employer will post the weekly Dial-A-Lift job schedule by 5:00 p.m. the Wednesday preceding the work week. Employees will submit requests and cancellations of requests for planned time off by 5:00 p.m. the Tuesday preceding the work week. The scheduled days off for the relief shift employee will not be changed by the employer after this posting unless the relief shift employees accepts an open piece of work.
- b. If work becomes open, the Employer will first offer the relief shift employee to flex their schedule to cover the work before offering the overtime. The Employer may use a non-bargaining unit employee or a qualified intern for up to two (2) hours to cover the work. Overtime will be offered to Specialists to cover the remaining open work.
- c. If two or more DAL Specialists are on vacation or in training, the two (2) hour limit will not apply.
- d. When work is made available for overtime that is 4 hours or less, the work will be offered to available DAL Specialists working that day in current bid seniority order. If not accepted by any DAL Specialist working that day, it will be offered to DAL Specialists who are off that day in current bid seniority order.

- e. Any DAL Specialist working on their day off will be guaranteed a minimum of 4 hours pay for that day.
- f. If the available work is more than 4 hours, the work will be offered to DAL Specialists with the day off in current bid seniority order. If the work is not accepted, the work will be offered to Specialists working the same day.
- g. If no DAL Specialist accepts the work, the work will be offered to a qualified DAL Specialist Intern. If no qualified DAL Specialist Intern is available to do the work, a DAL Specialist will be drafted to do the work in reverse current bid seniority order. If no bargaining unit employee is available to do the work, a non-bargaining unit employee may work it.

#### C. SPREAD TIME (PREMIUM PAY)

Operators working daily driving assignments not completed in ten (10) consecutive hours shall receive an additional \$1.50 per hour of premium pay, for each hour of work performed thereafter. Operators working non-driving assignments only will not be entitled to premium pay. Customer Service Representatives and Dial-A-Lift Dispatch Specialist working daily assignments not completed in ten (10) consecutive hours shall receive an additional \$1.50 per hour of premium pay, for each hour of work performed thereafter.

#### D. INCLEMENT WEATHER PAY

When inclement weather conditions cause the Employer to curtail service, the employee shall receive their scheduled daily pay provided:

1. The employee reports to work and remains on duty during the period of their scheduled regular work assignment (unless excused by the Employer); and
2. The employee has not been notified eight (8) hours prior to their scheduled on-duty report time.

If the Employer has notified the employee eight (8), or more, hours prior to their scheduled on-duty report time, the employee shall not be entitled to inclement weather pay, for the day or for any curtailed work days following the notice. However, the employee may use available vacation without prior notice. Any available work on curtailed service days will be assigned by seniority.

3. In cases of inclement weather or emergencies, Dial-A-Lift Dispatch Specialists and Customer Service Representatives may be required to work outside their normal work hours.

#### E. EMPLOYEE INTERNSHIPS AND TEMPORARY ASSIGNMENTS

The Union and the Employer agree that employees may volunteer for non-driving employee internships or temporary assignments when such internships or temporary assignments are made

available and posted by the Employer. These internships and temporary assignments will be managed in accordance with the Internships and Temporary Employee Guidelines.

#### F. TEMPORARY INSTRUCTOR PAY (PREMIUM PAY)

The Employer may, at its sole discretion, select volunteer operators to assist with the instruction and training of other employees. Temporary Instructors will be selected from volunteers based on their work record, communication skills, and other criteria related to particular training needs.

When an operator is selected and assigned to formally instruct other employees, he/she shall receive one dollar and fifty cents (\$1.50) per hour additional premium pay. This does not apply when operators or trainees are "riding" to familiarize themselves with the route. Operators selected as Temporary Instructors shall receive orientation/training specific to their assignment.

When a Temporary Instructor is unavailable, the replacement operator will receive one dollar and fifty cents (\$1.50) per hour additional premium pay for instructing trainees.

Dial-A-Lift Dispatch Specialists and Customer Service Representatives shall receive one dollar and fifty cents (\$1.50) per hour additional premium pay when they are providing formal, classroom instruction to other employees or are assigned to formally instruct other employees.

#### G. TEMPORARY EMPLOYEES

The Employer may hire non-agency personnel on a temporary basis to assist Customer Service in the case of a medical leave or if a Customer Service Representative position is unexpectedly open. The employer agrees to hire a temporary employee only if Customer Service staff, interns or transitional employees are not available. Overtime will have been offered first. A temporary employee's employment shall not extend beyond 90 consecutive calendar days without the mutual consent of the Employer and the Union.

## ARTICLE 14 - PERSONNEL BENEFITS

### A. PRORATION OF BENEFITS

All eligible employees shall receive a percent of the Employer's normal contribution for monthly personnel benefits in accordance with the following schedule:

#### 1. Insurance Coverage (medical/dental/life/disability):

The Employer shall pay the full Employer contribution amount for insurance benefits; the employee shall pay the employee contribution amount. Provided however, the Employer shall not pay contributions for insurance benefits during full calendar month leaves of absences without pay, unless such leave of absence is qualified under the Federal Medical Leave Act (FMLA).

#### 2. Leave Accruals (vacation/sick):

- a. Employees who work less than one half (1/2) of a pay period and are in a leave of absence without pay status shall receive prorated leave benefits; the proration will be based on hours worked. An employee who exhausts their paid leave will be credited with any newly accumulated leave time upon their return to work, or will be paid for their leave time upon termination.
- b. Leave benefits shall not be allowed during full calendar month leaves of absences without pay.
- c. Dial-A-Lift Dispatch Specialists and Customer Service Representatives will only accrue leave benefits per their position classification as defined as full-time at 100%,  $\frac{3}{4}$  time at 75%, and  $\frac{1}{2}$  time at 50%.

### B. INSURANCE COVERAGE (medical/dental/life/disability):

The Employer currently provides health care insurance benefits through the State of Washington Health Care Authority. A health care advisory committee, made up of representatives from both the Employer and the Union, shall be established on an as needed basis to discuss health care insurance benefits.

### C. HOLIDAY LEAVE

#### 1. Observed Holidays:

Employees shall be granted holiday pay in an amount equal to the employee's basic hourly rate of pay for eight (8) hours for each of the following observed holidays: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, and Christmas. It is understood that Dial-A-Lift Dispatch Specialists and Customer Service Representative employees (lead and non-lead classification) may be required to work on observed holidays.

2. Eligibility for Holiday Pay:

The employee will not be eligible for Observed Holiday pay if the employee is on approved leave without pay (LWOP) or LWOP due to exhaustion of accrued benefits on the employee's regularly scheduled work day prior to the holiday, the holiday, or the employee's regularly scheduled work day following the holiday.

An employee will be eligible for holiday pay when a pre-approved medical appointment or union business places the employee in LWOP status; or when the employee receives a late report but shows up for and completes their work day; or when an employee selects to use leave without pay (LWOP) at the end of their work day (30 minutes maximum) on the employee's regularly scheduled work day prior to the holiday, the holiday, or the employee's regularly scheduled work day following the holiday. An employee will be eligible for holiday pay if the employee selects to use LWOP on a reduced service holiday.

3. Reduced Dial-A-Lift Service Days

The Employer may release Dial-A-Lift Operators from their obligation to work on days when customer demand does not justify normal service levels. These days include the Friday after Thanksgiving and holidays where state, local, or federal offices are closed. This will be accomplished by increasing the number of vacation slots available on these days. The Dial-a-Lift Operator has the option of taking vacation or leave without pay.

4. Shortened Service Days

The Employer may shorten the service period on Christmas Eve and New Year's Eve. Other days may be added upon the prior agreement of the parties. Affected Operators may use leave without pay, personal holidays, or vacation time to cover this time.

5. Floating Holidays:

- a. Intercity Transit employees work many traditional holidays. In lieu of these holidays, each "eligible employee" will receive floating holidays each year. These will be awarded by adding up to forty-six vacation hours to each employee's accumulated vacation hours on January 1 of each year.

Employees who are not active for duty on January 1, and return to work after January 15 and remain in paid status, shall receive accrued floating holidays in the form of vacation hours on their date of return to work per the following schedule.

Returning to work by April 1:	37 hours
Returning to work by July 1:	28 hours
Returning to work by October 1:	19 hours

- b. Employees hired after January 1, will receive 10 hours of floating holiday time in the form of vacation leave on the date of classification and will accrue vacation hours in lieu of floating holiday time according to the following schedule:

April 1:           27 hours  
 July 1:            18 hours  
 October 1:        9 hours

D. VACATION LEAVE

1. Employees covered by this Agreement shall accrue vacation leave by reason of tenure based on the following schedule of continuous service with the Employer.
2. Dial-A-Lift Dispatch Specialists and Customer Service Representatives will only accrue vacation leave benefits per their position classification as defined as full-time at 100%,  $\frac{3}{4}$  time at 75%, and  $\frac{1}{2}$  time at 50%.
3. The following table illustrates vacation accrual rates.

YEARS OF SERVICE	ANNUAL VACATION HOURS
1	112
2	120
3 - 4	128
5	136
6 - 7	144
8 - 10	152
11 - 12	160
13 - 16	168
17 - 18	176
19	184
20 - 25	192
26 or more	200

4. Accrued vacation shall be credited on a pay period basis. Vacation accrued during an employee's probationary period shall not be credited until the employee has completed their probationary period.
5. Vacation leave may accrue year to year with a maximum accrual limit of three hundred sixty (360) hours on the employee's vacation accrual anniversary date. Upon the employee's vacation accrual anniversary date, the employee shall forfeit any vacation leave in excess of the maximum accrual limit.
6. Employees shall request vacation leave in accordance with the bidding procedures defined under Item E. Paid Leave Selection.

## E. PAID LEAVE SELECTION

A vacation week shall commence at 4:00 AM Sunday and end at 3:59 AM the following Sunday.

The Employer shall determine the number of vacation slots available for paid leave.

An employee may bid hours only actually earned at time of bid and may not bid hours on anticipated accruals. If an employee takes time off and does not have adequate vacation time to cover the complete day, vacation hours would be used and the remaining time would be leave without pay.

Dial-A-Lift Dispatch Specialists and Customer Service Representatives will be able to select their vacation leave from the available weeks posted in accordance with their bidding seniority.

### Operator:

The following agreements apply to the selection procedures for vacations, hereafter referred to as vacation slots. The procedures shall apply to both daily and weekly slots of time. Weekly slots shall be bid separately from daily slots.

1. A vacation year will run from March 1 to February 28 (29 in a leap year). Vacation slots shall be bid and awarded by seniority selections conducted during the following time periods:
  - a. A full vacation bid will begin within the last fifteen (15) days of February of each year.
  - b. An ongoing Friday bid will be conducted for any available vacation slots. Friday bids shall be submitted by proxy.
  - c. The employee is responsible to contact the Employer within their appointed time in order to bid.
  - d. In the event an employee fails to bid at the appropriate date and time, the employee will bid after the last scheduled bid of that day and before the first scheduled bid of the next day. If the employee fails to bid by the first scheduled bid of the next day, their bid time will fall to the end of that day. This process continues to the end of the bid period.
2. Vacations may be split into periods of one (1) or more full weeks. Vacation days may be combined with observed holidays to make up a full week. An employee may bid full-week vacations and up to five (5) single days. When an employee bids a full week off using single days, this will be considered a full week for the purposes of cancellation and hold downs.
3. If twenty-one (21) days prior to an employee's vacation, it is apparent that the employee will not have adequate accrued vacation time to cover the vacation, the vacation for that employee shall be canceled and made available for bid. The entire week shall be posted for bid. If the week is not bid, the time shall be made available on a single day basis. On the



day prior (Saturday is considered the day prior for Monday) open single day vacation slots, either coach or van, may be bid by any Operator if their request is submitted by 8:00 AM. No time off requests for Monday will be awarded after 8:00 AM on the previous Saturday. Requests may be submitted in person by completing a leave slip or by calling Scheduling at (360) 705-5894 or Dispatch at (360) 786-8703. The requesting Operator will be accountable for the accuracy of a called-in leave request.

4. An employee may cancel vacation in a manner that does not break up a full vacation week; provided however, vacation weeks may not be canceled during the twenty-one (21) calendar days prior to the scheduled start time of the vacation. (All vacation weeks start at 4:00 AM Sunday.) Cancelled weekly vacation slots shall be posted on the Monday following cancellation for bidding the following Friday. Available weekly vacation slots will be awarded by seniority following posting. Single day slots may be canceled by 9:00 AM the day prior to the vacation day.

Accrued vacation leave hours may not be used to supplement sick leave unless the sick related time-off extends beyond seven (7) consecutive calendar days. If the sick related time-off extends beyond seven (7) consecutive days, on the eighth (8<sup>th</sup>) day the employee will be required to use accrued vacation leave hours to supplement sick leave retroactively from the first day of the medical leave not covered by accrued sick leave. Accrued leaves shall be used until the employee returns to work or until all accrued leaves are exhausted. The requirement to use all available accrued leaves is in accordance with Section J. Leaves of Absence Without Pay, Item 3.b.

Depending upon the length of the employee's sick related time-off, it is understood that vacation slots previously bid may need to be canceled. The twenty-one (21) day cancellation period requirement may be waived by the Employer based upon the medical circumstances involved.

#### Dial-A-Lift Dispatch Specialist:

Vacation bidding will be on the same schedule as the shift bid. On-going vacation requests will be awarded as they are received. In the case of two bids received at the same time rotating seniority will prevail.

A vacation must be cancelled by 5 p.m. on Tuesday of the previous week.

#### Customer Service Representative:

1. The Employer will hold a general vacation bid at least once each calendar year. Prior to the vacation bid, the Employer will designate any weeks within the calendar year which would not be available for vacations due to service changes. The two (2) weeks prior to each service change will not be available for vacations.
2. Vacations may be bid in blocks of two (2) or more days. A holiday will not break up a block of two or more days. Partial day vacation requests will be considered as full days for

awarding purposes. Remaining single days will be available for bid after the vacation bid is complete.

3. The vacation sign-up sheet will be posted in the Customer Service Office seven (7) days prior to the bid. Bids may be submitted in writing on the Bid Time-Off Request form or in person on the vacation sign-up sheet.
4. Vacation weeks must be canceled by fourteen (14) calendar days prior to the scheduled start time of the vacation. Single day slots must be canceled by 3:00 p.m. on Tuesday of the week prior.
5. Canceled weeks will be posted and will be available on a seniority basis. If the canceled vacation days are not bid, it will be converted to single day availability.
6. If a person does not bid at his/her scheduled bid time, it will be assumed that he/she does not wish to bid at this time and will be passed over.
7. After the bid is complete, open vacation and single days will be available on a first come, first serve seniority basis. Paid leave requests after the vacation bid may be submitted in writing on the standard Time-Off Request form for any open vacation slots during the bid period. The requests will be subject to availability and approval by the Customer Service Supervisor.
8. If a problem arises under this section, the Employer and the Union agree to meet and attempt to resolve the problem to the mutual benefit of the parties involved.

#### F. SICK LEAVE

1. Operators will accumulate sick leave at a rate equivalent to eight (8) hours for each full month of service.

Dial-A-Lift Dispatch Specialists and Customer Service Representatives will only accrue leave benefits per their position classification as defined as full-time at 100%,  $\frac{3}{4}$  time at 75%, and  $\frac{1}{2}$  time at 50%. For example, full-time employees will accumulate sick leave at a rate equivalent to eight (8) hours for each full month of service.

Sick leave hours will be credited on a pay period basis. Sick leave accumulated in one (1) year may be carried over to succeeding years to a maximum of nine-hundred sixty (960) hours.

2. Sick leave shall not accrue during leaves of absences without pay or layoffs.
3. Sick leave shall be granted for the following reasons:
  - a. Personal injury, illness, or forced quarantine of the employee.

- b. Inpatient or outpatient medical care, dental care, and medical/dental appointments of the employee.
- c. Pregnancy, childbirth, or pregnancy-related condition of an employee which prevents the employee from performing her normal job duties.
- d. To care for an employee's spouse or designated other with a health condition that requires treatment or supervision.

"Designated other" shall be defined as an individual whom the employee has designated at the beginning of each calendar year; the designation must be received by the Employer by January 15 of each year. Designation shall be made by completing an "Employee Designated Other" Form as furnished by the Employer. Employees shall be limited to naming only one (1) designated other.

- e. To care for an employee's child nineteen (19) years of age or under, mother or father, or mother-in-law or father-in-law, with a health condition that requires treatment or supervision. The family member term applies equally to natural, step, or adoptive or custodial family relationships.
  - f. In the event of the death of an employee's lawful spouse or designated other (as defined above), or the employee or spouse's father, mother, brother, sister, child, grandparent, grandchild, aunt, or uncle, the employee may be granted sick leave with pay for a maximum of three (3) working days; provided the employee has sufficient sick leave accrued. Additional leave (vacation leave or leave without pay) may be granted where circumstances warrant. Family member terms apply equally to natural, step, or foster family relationships. Verification of death may be required by the Employer. Such verification shall be in the form of a published funeral notice, obituary, or copy of death certificate.
  - g. Family Leave - State or Federal Law: In addition to the above, an employee is eligible to request unpaid time-off under Washington State's Family Leave Law (child related care) or the Federal Medical Leave Act (FMLA) (employee, child or family member related care). Written notice of the intent to take family leave must be provided to the Employer thirty (30) days before the anticipated first day of the leave, unless an emergency exists. The employee is required to submit doctor certification, on approved Employer provided forms, for all time off associated with Family Leave.
  - h. In addition, an employee is eligible to request paid leave under the Washington Family Care Act.
4. When an employee is absent due to illness or disability, they must notify the Employer immediately, failure do so may result in denial of sick leave pay.

The employee may be required to submit to the Employer medical evidence of their illness or disability from a licensed medical doctor or any other satisfactory evidence, if requested by the Employer, in order to receive sick leave pay.

The Employer will not be liable for any expenses incurred resulting from the verification of illness or disability by a physician or any other satisfactory source of evidence.

5. Absence for part of a day for reasons in accordance with the sick leave provisions shall be charged against accrued sick leave in an amount not less than one-half hour. Holidays and other regular days off shall not be charged against sick leave.
6. Probationary employees shall be eligible to accrue and use paid sick leave.
7. Sick Leave Cash Out/Trade Policy

a. Cash Out at Separation of Employment or Retirement:

Upon separation of employment or retirement, under non-disciplinary circumstances and with completion of at least five (5) years of employment with the Employer, each employee shall be paid for all accumulated sick leave at the following rate:

Hours of Accrued Sick Leave	Cash Out Rate
1 to 400	1 to 5 for hours 1 to 400
401 to 600	1 to 4 for hours 1 to 600
601 to 960	1 to 3 for hours 1 to 960

The requirement for the completion of five (5) years of employment with the Employer will be waived if the employee is laid off.

b. Sick Leave Trade:

Employees who have accrued in excess of four hundred (400) hours of sick leave may annually in June exercise one of the following options for hours in excess of four hundred (400) hours:

1. Trade four (4) hour increments of sick leave for one (1) hour of vacation.
2. Continue to accrue sick leave.
3. Trade four (4) hour increments of sick leave for one (1) hour of pay.

Employees will be allowed to trade up to ninety-six (96) hours of sick leave each year.

- c. All pay for sick leave cash out or trade shall be at the employee's regular, straight-time rate of pay at the time of the cash out or trade.

8. On-The-Job-Injury (Worker's Compensation)

Intercity Transit will provide Workers Compensation Insurance in accordance with State statutory requirements. If an employee is absent due to illness or injury for which they are receiving payment from the State Industrial Insurance, the employee may elect to also use accrued sick leave hours that, together with payment from the State.

The employee is required to notify the Employer if the employee elects to use accrued sick leave to supplement their earnings and elect the percentage of sick leave hours to be used and elect the percentage of sick leave hours to be used. Use of any paid sick leave for an on the job injury will be calculated on a retroactive basis back to the first day in which the employee was off work due to the injury or illness. The employee's available sick leave hours will be used until exhausted unless the employee opts to stop the sick leave usage. After the initial designation the employee may request such compensation be started or terminated at any time, but such request shall only be made once per injury.

Upon exhaustion of accrued sick leave, the employee may elect to use, in the same manner as defined above, other accrued leave hours (vacation leave) retroactive to date of exhaustion of paid sick leave; provided however, the employee may not elect to use other paid leave hours unless the sick related time off extends beyond seven (7) consecutive days in accordance with Section E. 5. Such available leave hours will be used until exhausted. The employee may request such compensation to be started or terminated at any time, but such request shall only be made once per injury. Vacation leave hours are not subject to buyback.

Upon return to work from a worker's compensation leave period, an employee may buy back sick leave hours. The employee may elect to purchase back all or a portion of the sick leave hours used and paid to the employee during the employee's disability period. The employee must notify the Employer of their intent to buy back paid sick leave hours; such notification must be made to the Employer within forty-five (45) days from the date upon which the employee returns to work from the disability. The employee shall make payment to the Employer in the manner prescribed by the Employer for such leave hours. Once the employee has made payment to the Employer for the total amount due based on the number of hours the employee has elected to buy back, the employee's leave hours will be added back to the employee's accrual records.

The Employer will notify the employee of the sick leave buyback policy when applicable.

## 9. Shared Leave Policy

Employees may participate in the Shared Leave Policy adopted by the Employer per POHR 3501. This policy allows eligible employees to donate a portion of their accrued vacation leave to other eligible employees who are in need of assistance owing to serious illness or injury.

## G. TRANSITIONAL WORK ASSIGNMENTS (previously Article 13, F)

1. Transitional work assignments will be operated in accordance with the Transitional Work Assignment Guidelines developed by the Employer and the Union.

Employees who experience an on-the-job injury or illness which results in their temporary inability to return to the full range of duties of their regular position classification will accept transitional work assignments if offered by the Employer. Employees who experience an off-the-job injury or illness which results in their inability to return to the full range of duties

of their regular position classification may be eligible for transitional work assignments if offered by the Employer.

2. Transitional work assignments will consist of work which is within the restrictions outlined by the employee's health care provider. Such assignments may be:
  - a. part-time or full-time, with a temporary waiver of certain regular duties (reasonable accommodation), in an employee's regular position classification; or
  - b. part-time or full-time in another capacity.
3. Employees assigned to transitional work assignments will receive their regular hourly rate of pay for their regular job classification for the number of hours worked in the transitional work assignment. Operators are not eligible for premium pay, unless actually worked in accordance with Article 13.C.
4. Assignment to transitional work depends upon the availability of such work and of work suitable to the employee's medical restrictions. A transitional work assignment may be terminated at any time by the Employer.
5. For employees with non-job-related injuries/illnesses, assignment to transitional work may be ended in order to provide transitional work assignment to an employee injured on-the-job.
6. Employees refusing to work transitional work assignments will not be eligible for worker's compensation benefits or paid leave benefits.
7. The Union and the Employer will meet to resolve any issues that may arise in the implementation of transitional work assignments.

#### H. MODIFIED WORK ASSIGNMENTS

Employees who experience an injury may return to their regular position at less than full time as long as the injury does not limit their full range of duties. This Modified Work Assignment (modified hours only) is allowed with the following stipulations;

1. Employees must provide a doctor's release specifically for Modified Work Assignments identifying maximum initial work hours and a plan to increase hours to full time.
2. Modified Work Assignments are designed to be of limited duration. The timeline will be determined on a case-by-case basis not to exceed 60 calendar days.
3. The Employee must make reasonable progress to full time status;
4. Employees must be able to work at least 4 continuous hours (drive/seat time hours);
5. Employees assigned to Modified Work Assignments will receive their regular hourly rate of pay.

## I. MILITARY LEAVE

1. Military leave shall be provided in accordance with the Uniformed Services and Reemployment Rights Act (USERRA), RCW 38.40.060 and other applicable laws. Written verification supporting the request for Military Leave shall be submitted by the employee in a timely manner.

## J. JURY SERVICE LEAVE

An employee shall continue to receive their regular wages for any period of required service as a juror. A copy of the court notification for required jury service must be provided to the Employer. Employees will report for work when less than a normal work day is required by such duties. An employee will not be required to report to work prior to reporting to jury service.

## K. LEAVES OF ABSENCE WITHOUT PAY

1. Non-Medical Related Leave (10 Days Maximum):
  - a. An employee may be granted one, or more, non-medical related leave of absences without pay of up to ten (10) days per calendar year, at the discretion of the Employer.
  - b. The employee shall not be required to use all earned vacation leave prior to the above defined non-medical related leave of absence without pay.
  - c. Personnel benefits shall not be prorated during the above defined non-medical related leave of absence without pay.
2. Non-Medical Related Leave (11 Days to 1 Year):
  - a. An employee may be granted a leave of absence without pay for non-medical related reasons for a period not to exceed one (1) year, at the discretion of the Employer.
  - b. A non-medical related leave of absence without pay shall only be granted to the employee if the employee has used all earned vacation leave.
  - c. Applicable personnel benefits shall be prorated during the non-medical related leave of absence without pay.
3. Medical Related Leave Without Pay (1 Day to 9 Months):
  - a. An employee may be granted a medical leave of absence without pay for medical related reasons for a period not to exceed nine (9) months.
  - b. A medical related leave of absence without pay shall only be granted to the employee if the employee has used all accrued leave benefits to include accrued sick leave hours and

accrued vacation leave hours (includes any hours previously bid for vacation slots). The medical leave of absence would be effective from the date of exhaustion of all accrued leave benefits. However, in cases where the employee was eligible for and used State or Federal family leave, the medical leave without pay would be effective from the date of exhaustion of the family leave.

- c. If the employee is on a medical related leave of absence and is receiving worker's compensation from the State, the effective date of the nine (9) month medical leave of absence would be figured in the same way as if the employee was not receiving worker's compensation. This would apply whether or not the employee had elected to use paid leave hours to supplement the disability payments the employee was receiving from the State. The employee's available leave hours to include sick leave, vacation leave, and pre-bid vacation hours would be calculated at full rate (in the same manner as if the employee was not receiving worker's compensation) retroactive to the first day in which the employee was off work due to injury or illness; said calculation would continue until exhaustion of all accrued leave benefits. The medical leave of absence would be effective from the date of exhaustion of all accrued leave benefits. However, in cases where the employee was eligible for and used State or Federal family leave, the medical leave without pay would be effective from the date of exhaustion of the family leave.
- d. Applicable personnel benefits shall be prorated during the medical related leave of absence without pay.



## ARTICLE 15 - OTHER WORKING CONDITIONS

### A. STATE PENSION

All eligible employees shall be covered by the Washington State Public Employees' Retirement System.

### B. DEFERRED COMPENSATION PLAN

The Employer will contribute 7.65 percent (0.0765) of total wages, for those employees hired on or before March 31, 1986, and 6.20 percent (0.0620) of total wages for those employees hired on or after April 1, 1986, to a deferred compensation plan, as established by the Employer under Section 457 or 401(k) of the Internal Revenue Code, for each participating employee on a per pay period basis.

The employees shall be covered by this deferred compensation plan unless the Employer is required to contribute additional FICA (Federal Insurance Contributions Act) employee contribution matches. It is agreed that these amounts will offset the Employer's contributions as defined above.

The provisions of this section shall only apply to an employee electing to make contributions to the same deferred compensation plan in an amount equal to, or more than, the Employer's contribution as defined above. The Employer shall have no obligation to contribute to the deferred compensation plan for employees who fail to contribute to the plan, or for those employees who choose to contribute less than the established Employer contribution amount as defined above.

Once each calendar year, employees will have the opportunity to change which of the deferred compensation plans, established by the Employer, they participate in.

### C. TUITION REIMBURSEMENT

The Employer shall establish an account from which employees will be eligible to be reimbursed for educational training courses under the following conditions:

1. The employee has made application for, and received written approval from their department director, or the director's designee, for each course prior to the taking of the course.
2. The employee submits satisfactory completion of the course. In terms of an academic grade a "C" or better shall meet this requirement.
3. Funds for the course are available in the current budget.
4. The course is related either directly or indirectly to the employee's position.

5. All books and other materials purchased by or reimbursed by the Employer shall become the property of the Employer at the completion of the course. Such books will be placed in the Employer's library or other location as appropriate for use by other employees.
6. This account shall be funded by the Employer in the amount of \$5,000 per year.

#### D. MEDICAL EXAMINATIONS

For purposes of this section, "medical examination" shall include an employee's physical or mental condition; and "physician" shall be defined as an individual who is licensed in the State of Washington to perform the required examination.

Required drug and/or alcohol testing will fall under the Employer's drug and alcohol policies. Any policy regarding physical agility or fitness tests is separate from these provisions.

##### 1. Medical Examination – Ability to Work Examination

The Employer may require an employee to undergo a medical examination by an Employer selected physician to determine an employee's qualifications to adequately perform their work assignments, in accordance with applicable federal regulations. The Employer will compensate the employee for lost work hours, up to two (2) hours maximum, and the cost of the physical examination.

Refusal to submit for a medical examination when requested by the Employer may constitute just cause for termination of employment.

##### 2. DOT CDL Re-certification Physical Examination

All Commercial Driver License (CDL) holders are required to undergo and successfully pass a Department of Transportation and State of Washington Department of Licensing physical examination every two (2) years (or deemed necessary by the medical provider) throughout their employment. Drivers are required to obtain medical examinations from a certified medical examiner listed on the National Registry.

The employee may choose to use either an Employer selected physician or a personal physician for the required examination. A copy or the original of the medical examiner's certificate, signed by the Employer or employee selected physician, must be provided to the Employer's Human Resources Office at the completion of the examination. The employee must carry the valid medical examiner's certificate on his/her person at all times while driving a commercial vehicle. Employees not in compliance are not allowed to drive.

Employer Physician: If the employee chooses the Employer selected physician, the cost of the exam will be billed directly to and paid by the Employer. The Employer selected physician will retain a copy of the physical examination on file.

Employee Physician: If the employee chooses to use a personal physician, the employee is eligible to receive reimbursement for the cost of the exam (to include any required co-pay

for the office visit). Employees will submit satisfactory evidence of the costs he/she incurred and the completed medical verification. The maximum allowed reimbursement will be up to that amount Intercity Transit would have paid for use of our physicians (lowest billing cost).

### 3. Return to Work Examination

An employee who wishes to return to work from a sick leave, or a leave of absence, due to a physical disability which prevented the employee from performing their assigned work, may be required to provide the Employer with a medical release from a physician of the employee's choosing, at the employee's expense, which indicates the employee is fully able to perform all of the essential functions of the position in which the employee is employed. Should the Employer refuse to accept the employee's medical release, the Employer shall schedule an appointment with the Employer selected physician as soon as possible. The employee will be required to cooperate in completing the medical examination.

### 4. Examination Review

Should any Employer required medical examination reveal the employee is not able to perform the essential functions of their assigned work, they may, at their option, have a review of their case in the following manner:

- a. Within fifteen (15) calendar days from the date of the employer's notification to the employee that they are unable to perform the essential functions of their assigned work, the employee may employ a physician of their choosing, at their own expense, for the purpose of conducting a further examination for the same purpose as the physical examination made by the Employer selected physician. A copy of the findings of the physician chosen by the employee involved shall be furnished to the Employer. In the event that such findings verify the findings of the Employer selected physician, no further medical review of the case shall be afforded.
- b. In the event there is a difference of opinion relative to the diagnosis between the Employer's examining physician and the physician chosen by the employee, a physician shall be mutually designated by the Employer's physician and the employee's physician. The mutually designated physician's decision relative to the diagnosis shall be final and binding as to the physical and mental fitness of the employee to perform the work of the position which the employee is employed in. Should the mutually designated physician rule in favor of the employee, the employee shall be allowed to return to work and made whole.

The costs incurred for the mutually designated physician's examination shall be borne equally by the Employer and the Union.

## E. EMPLOYEE UNIFORMS

1. The Employer shall furnish each new Operator and Dial-A-Lift Dispatch Specialist with a complete set of uniforms, at no cost to the Operator, to include the following uniform

garments: (1) 3-1 Jacket, (1) Lightweight Jacket, (5) shirts or polo shirts, (5) pairs of trousers, (1) Backpack, (1) Vest, (1) Cap and Knit cap.

2. Uniforms are to be worn only while on duty or while traveling to and from work and shall not be used for purposes deemed inappropriate by the Employer. Employees will be required to be in the appropriate uniform dress during their working hours to include Sign-In.
3. The Employer will determine and replace or repair any item of the uniform that has normal wear and tear.
4. All uniforms furnished by the Employer shall remain the property of the Employer.
5. The change to a Quarter-Master system will be effective upon ratification. All unutilized Employee balances as of the date of ratification will be returned to the agency's Uniform Budget.
6. The Employer reserves the right to implement a uniform dress code for Customer Service Representatives at a future date.

#### F. EMPLOYER SPONSORED EVENTS OR PROGRAMS

Employees participating in Employer sponsored events or programs shall be entitled to receive such prizes, awards, incentives, and compensation as the Employer may deem appropriate.

#### G. TRANSPORTATION PASSES

Free transportation passes shall be provided to all active employees, and their dependents. For purposes of this section, dependents shall be defined as the employee's spouse or the employee's registered domestic partner or children (child must be nineteen [19] years of age or under or up to age twenty-three (23) if they have a current, local student identification card). The term child applies equally to natural, step, or adoptive or custodial family relationships. Transportation passes will also be provided to all retired employees and their spouses or registered domestic partners who leave Intercity Transit with twenty (20) years of service or have reached the age of sixty-two (62) with at least five (5) years of service. The passes will be honored on all of the Employer's regularly scheduled buses and vans.

#### H. EXACT FARE

The exact fare system which was instituted January 1, 1975 shall be continued for the life of this Agreement.

## **ARTICLE 16 - EMPLOYER RULES AND REGULATIONS**

The Employer agrees to notify the Union of any changes in the Employer's rules and regulations. The Employer further agrees to make a copy of the Employer's rules and regulations available to all employees.

## **ARTICLE 17 – WAGES**

Employees covered by this Agreement shall be compensated in accordance with the applicable wage schedules specified in Appendix A and Appendix B of this Agreement. The wage schedules shall be considered a part of this Agreement.

Wage Increases Include:

2015: 2.0% General Wage Adjustment, effective 1/1/15

2016: 2.5% General Wage Adjustment, effective 1/1/16

2017: 2.75% General Wage Adjustment, effective 1/1/17

## **ARTICLE 18 - SAVINGS CLAUSE**

Should any provision of this Agreement or the application of such provision be rendered or declared invalid by any court action or by reason of any existing or subsequently enacted legislation, the remaining portions of this Agreement shall remain in full force and effect. Both parties agree to immediately attempt to renegotiate such provision to a valid form acceptable to both parties.

## **ARTICLE 19 - ENTIRE AGREEMENT**

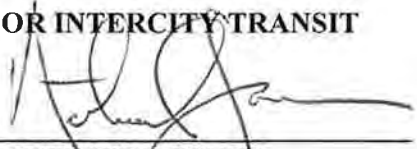
The Agreement expressed herein in writing constitutes the entire agreement between the parties and no express or implied statement or previously written oral statements shall add to or supersede any of its provisions. Collective bargaining on any subject, whether included in this Agreement or not, is closed for the term of this Agreement unless the parties agree by mutual decision to amend the Agreement or enter into a memorandum of understanding on a particular subject during the term of this Agreement.


## ARTICLE 20 – TERM

This Agreement shall become effective January 1, 2015. It shall remain in full force and effect until December 31, 2017.

Dated and signed this 13<sup>th</sup> day of April 2015.

**FOR INTERCITY TRANSIT**

  
\_\_\_\_\_  
**NATHANIEL JONES**  
Authority Chairperson

  
\_\_\_\_\_  
**ANN FREEMAN-MANZANARES**  
General Manager

  
\_\_\_\_\_  
**JIM MERRILL**  
Operations Director

  
\_\_\_\_\_  
**HEATHER STAFFORD SMITH**  
Human Resources Director

  
\_\_\_\_\_  
**MARK SANDBERG**  
Operations Manager

  
\_\_\_\_\_  
**EMILY BERGKAMP**  
Dial-A-Lift Manager

  
\_\_\_\_\_  
**JOY GERCHAK**  
Customer Service Supervisor

**FOR THE AMALGAMATED TRANSIT  
UNION, LOCAL 1765**

  
\_\_\_\_\_  
**ED BRICKER**  
President/Business Agent

  
\_\_\_\_\_  
**RUSTY CALDWELL**  
Assistant Business Agent

  
\_\_\_\_\_  
**CHUCK GRAHAM**  
Contract Committeeperson

  
\_\_\_\_\_  
**KELLY PERKINS**  
Contract Committeeperson

  
\_\_\_\_\_  
**AGUSTUS HULL**  
Contract Committeeperson

  
\_\_\_\_\_  
**LORI JOHNSON**  
Contract Committeeperson

**APPENDIX A and B  
WAGE SCHEDULE**

(wage rates to be effective January 1 of each year)

	2015	2016	2017
<b>Coach Operators</b>	<b>2.00%</b>	<b>2.50%</b>	<b>2.75%</b>
Operator I	\$ 16.89	\$ 17.31	\$ 17.79
Operator II	\$ 18.07	\$ 18.52	\$ 19.03
Operator III	\$ 19.36	\$ 19.84	\$ 20.39
Operator IV	\$ 20.76	\$ 21.28	\$ 21.87
Operator V	\$ 22.16	\$ 22.71	\$ 23.33
Operator VI	\$ 23.75	\$ 24.34	\$ 25.01
Operator VII	\$ 25.60	\$ 26.24	\$ 26.96

	2.00%	2.50%	2.75%
<b>Van Operators</b>			
Operator I	\$ 15.90	\$ 16.30	\$ 16.75
Operator II	\$ 17.57	\$ 18.01	\$ 18.51
Operator III	\$ 19.25	\$ 19.73	\$ 20.27
Operator IV	\$ 20.93	\$ 21.45	\$ 22.04
Operator V	\$ 22.59	\$ 23.15	\$ 23.79

	2.00%	2.50%	2.75%
<b>Dial-A-Lift Dispatch Specialists</b>			
Probation	\$ 22.25	\$ 22.81	\$ 23.44
DAL Dispatch Specialist I	\$ 24.19	\$ 24.79	\$ 25.47
DAL Dispatch Specialist II	\$ 25.42	\$ 26.06	\$ 26.78
DAL Dispatch Specialist III	\$ 26.63	\$ 27.30	\$ 28.05
DAL Dispatch Specialist IV	\$ 27.82	\$ 28.52	\$ 29.30
DAL Dispatch Specialist V	\$ 29.07	\$ 29.80	\$ 30.62
DAL Dispatch Specialist VI	\$ 30.87	\$ 31.64	\$ 32.51

	2.00%	2.50%	2.75%
<b>Customer Service Representatives</b>			
Probation	\$ 15.90	\$ 16.30	\$ 16.75
C.S. Representative I	\$ 17.49	\$ 17.93	\$ 18.42
C.S. Representative II	\$ 18.37	\$ 18.83	\$ 19.35
C.S. Representative III	\$ 19.29	\$ 19.77	\$ 20.31
C.S. Representative IV	\$ 20.29	\$ 20.80	\$ 21.37
C.S. Representative V	\$ 21.30	\$ 21.83	\$ 22.43
C.S. Representative VI	\$ 22.37	\$ 22.93	\$ 23.56

Lead C.S. Rep. I	\$ 22.61	\$ 23.18	\$ 23.82
Lead C.S. Rep. II	\$ 23.76	\$ 24.35	\$ 25.02
Lead C.S. Rep. III	\$ 24.93	\$ 25.55	\$ 26.25

## **APPENDIX C**

### **ACCIDENT REVIEW COMMITTEE**

In the event a dispute arises over the determination of Preventability of an accident, an Operator has fourteen (14) calendar days from the date notified to submit a written request for review of the Fixed Route Manager's determination. A Committee consisting of one (1) employer member, one (1) union member, and an impartial person from the outside will meet within thirty (30) days from the date of the Operator's written request. The impartial person from the outside will be chosen jointly by the Employer and the Union. This accident shall remain "under investigation" with regard to discipline until a determination has been made by the Accident Review Board (Article 9, B. does not apply to this situation). Any costs for an outside party shall be borne equally by both parties.

This section supercedes language regarding the Accident Review Panel process found in the Operators Manual.



## APPENDIX D

### DISCIPLINE GUIDE

Intercity Transit requires good performance as a condition of continued employment.

This Guide has been prepared to inform employees of actions that may be taken for unacceptable performance, inappropriate behavior, or violations of rules and regulations. It is a guide to employees involved in disciplinary issues and should not be construed as a hard and fast limitation upon Supervisors in dealing with such matters.

This Discipline Guide is based on the principle of uniformity and progression, and is designed to be instructive and corrective, rather than strictly punitive. This is achieved by using levels of discipline (A, B, C, or Late Reports); along three separate lines of progression, (Traffic/Safety, Late Reports and all others). The numbers of steps in any line of progression depends on the seriousness of any single violation as well as a consideration of the employee's overall job performance, including active disciplines.

All disciplinary actions are subject to the terms of the Labor Agreement.

#### **Definitions: Active for Work**

For purposes of this Article "active for work" is defined as: All paid time being credited towards the specified period of time with the following exceptions:

1. Sick leave used to supplement a medical leave without pay beyond **ten (10)** consecutive calendar days will not be considered active for work.
2. Sick leave used to supplement an on-the-job injury beyond **ten (10)** consecutive calendar days will not be considered active for work.
3. Leave of absence without pay beyond **ten (10)** consecutive calendar days will not be considered active for work.
4. Time off from work due to an on the job injury will not be considered active for work.

#### **Definitions: Active Disciplines**

For purposes of this Article "active disciplines" are defined as: All disciplines that have not expired.

#### **Categories "A" & "B"**

Most performance problems in the workplace will fall under progressive discipline as a means of correcting the problem. However, there are some infractions which, by their severity or seriousness, would warrant more immediate and decisive action and therefore are categorized as A or B offenses.

## **Category "A"**

Category A infractions are major infractions having the potential of dismissal on a first (or any) occurrence. Category A discipline that does not result in immediate dismissal shall remain active for thirty-six (36) months. Certain Category A violations will remain active for an unlimited duration. These include:

- Prohibited harassment
- Prohibited discrimination
- Fighting or violence in the workplace
- Theft
- Gross insubordination

In the event a previous Category A violation is considered by the employer in determining a subsequent disciplinary sanction and the subsequent discipline is subject to a Step 3 (arbitration) review in the grievance procedure, the impact of the previous Category A discipline on the subsequent discipline may be considered by the arbitrator in the arbitrator's application of the just cause standard.

## **Last Chance Agreement**

In lieu of termination, the parties may agree to the terms of a Last Chance Agreement (LCA). The terms of an LCA are subject to the mutual agreement of the parties and unless otherwise agreed set no precedent for other disciplines.

## **Category "B"**

A category B infraction is a serious infraction having the potential of a written warning, a suspension or causing an employee to be placed on decision-making leave. Discipline in this category will be issued in a line of progression, when appropriate. Examples of category B infractions include, but are not limited to:

- Insubordination
- Responsibility for a serious incident
- Failure to follow accident procedures
- Falsification of or failure to file a report
- Falsification of any employment record
- Reckless driving

Category B violations will remain in effect for twenty-four (24) months when the employee is "active for work." The period of effect may be shortened to eighteen (18) months or extended up to thirty (30) months, commensurate with the seriousness of the violation and/or number of previous violations (category B and category C).

If an Operator is currently at a Written Warning or above level of discipline a Category B infraction may result in termination of their employment at Intercity Transit.

## **Last Chance Agreement**

In lieu of termination, the parties may agree to the terms of a Last Chance Agreement (LCA). The terms of an LCA are subject to the mutual agreement of the parties and unless otherwise agreed set no precedent for other disciplines.

### **Category “C”**

A Category C infraction is a less serious infraction, nevertheless, warranting discipline up to and including a written warning. This category of discipline follows a line of progression consisting of six steps.

A Category C violation will remain in effect for twelve (12) months when the employee is “active for work.”

If the employee commits another violation, the employee will be placed in the next level of discipline.

The employee will remain in a category of discipline until an earlier active discipline expires or they commit another violation. If an earlier violation expires, the employee will be moved to the previous discipline level. If a violation occurs, the employee will be moved to the next level of discipline.

However, in the event an employee is subject to Step 4 (Decision-Making Leave) or above discipline, said discipline will remain active for twelve (12) months when the employee is “active for work” following the date of said discipline.

Disciplinary Steps for Class C violations are:

#### **Step 1-Counseling Session:**

Although it is the first step in the disciplinary process, it is considered non-disciplinary in nature and is the written record of a verbal reprimand.

#### **Step 2-Notice of Discipline:**

This is given for minor violations if an Operator has an active Counseling Document.

#### **Step 3-Written Warning:**

This is given when an Operator already has two active C Violations.

#### **Step 4-Decision Making Leave:**

If the employee commits another violation during the Written Warning period, the employee will be placed in the next level of discipline (Decision-Making Leave). The employee will remain in that category of discipline for a period of twelve (12) months, when the employee is active for work.

#### **Step 5-Suspension:**

Any violation while an employee is in Decision-Making Leave period that does not result in termination will cause the employee to be suspended without pay. The employee will remain in that category of discipline for a period of twelve (12) months, when the employee is active for work.

#### Step 6-Termination:

If the employee commits another violation during the Suspension period their employment at Intercity Transit will be terminated.

#### **Last Chance Agreement**

In lieu of termination, the parties may agree to the terms of a Last Chance Agreement (LCA). The terms of an LCA are subject to the mutual agreement of the parties and unless otherwise agreed set no precedent for other disciplines.

#### **Late Reports**

A late report remains active for a period of 12 months. At the end of twelve (12) months, the late report expires and the employee is moved to the lower discipline level unless they have reached the Decision-Making Leave discipline level.

#### Initial Occurrence – Operations Log Entry

In the instance of a late report when the employee has no active late reports, Operations shall make a log entry of the late report. A copy of the log will be placed in the employee's Operations file.

Disciplinary Steps for Late Report violations include the following:

#### Step 1 - Counseling Session:

An employee is placed at this step when they have one active late report (Operations Log Entry) at the time of the violation.

#### Step 2 - Notice of Discipline:

This is given for a late report if an employee has two active late reports.

#### Step 3 - Written Warning:

This is given for a late report when an employee has three active late reports.

#### Step 4 - Decision Making Leave:

If the employee has a late report while having an active Written Warning, the employee will be placed in Decision-Making Leave. The employee will remain in that category of discipline for a period of twelve (12) months, when the employee is "active for work."

#### Step 5-Suspension:

Any violation during the Decision-Making Leave period of twelve (12) months that does not result in termination will cause the employee to be suspended without pay. The employee will remain in that category of discipline for a period of twelve (12) months, when the employee is "active for work."

#### Step 6-Termination:

If the employee commits another violation during the Suspension period of twelve (12) months, their employment at Intercity Transit will be terminated.

### **Last Chance Agreement**

In lieu of termination, the parties may agree to the terms of a Last Chance Agreement (LCA). The terms of an LCA are subject to the mutual agreement of the parties and unless otherwise agreed set no precedent for other disciplines.

### **Discipline Related to Traffic/Safety Violations**

For Steps 1 and 2, discipline for an employee's traffic safety record will remain active for twelve (12) months when the employee is "active for work". For Steps 3-6, discipline for an employee's traffic safety record will remain active for thirty-six (36) months when the employee is "active for work."

Disciplinary Steps for Traffic/Safety Discipline in this category will be issued in a line of progression, when appropriate. The following are the typical steps:

#### **Step 1-Counseling Session:**

Although it is the first step in the disciplinary process, it is considered non-disciplinary in nature and is the written record of a verbal reprimand.

#### **Step 2-Notice of Discipline:**

This is given for minor violations if an Operator has an active Counseling Document.

#### **Step 3-Written Warning:**

This is given when an Operator already has two active Traffic/Safety Violations.

#### **Step 4-Decision Making Leave:**

If the employee commits another violation during the Written Warning period, the employee will be placed in the next level of discipline (Decision-Making Leave).

#### **Step 5-Suspension:**

Any violation while an employee is in Decision-Making Leave period that does not result in termination will cause the employee to be suspended without pay.

#### **Step 6-Termination:**

If the employee commits another violation during the Suspension period their employment at Intercity Transit will be terminated.

### **Last Chance Agreement**

In lieu of termination, the parties may agree to the terms of a Last Chance Agreement (LCA). The terms of an LCA are subject to the mutual agreement of the parties and unless otherwise agreed set no precedent for other disciplines.

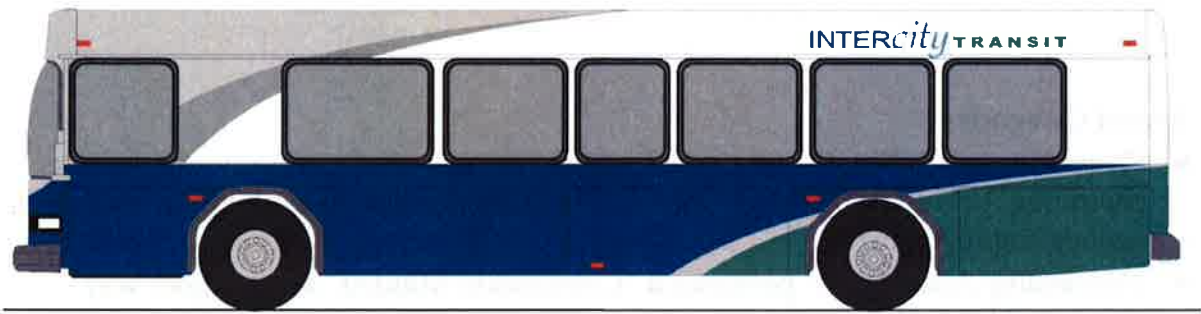
**Memorandum of Agreement  
Between Intercity Transit and ATU, Local 1765  
Regarding Extraboard Hours**

The Union and Intercity Transit agree to form a Study Group to improve the equalization of Extraboard hours. Details with regard to members of the Study Group, timeframe, and details will be discussed at the first joint labor-management committee meeting following ratification of the labor agreement.

\_\_\_\_\_  
For Intercity Transit

\_\_\_\_\_  
For ATU, Local 1765

Date: \_\_\_\_\_



# INTERcity TRANSIT

## EMPLOYEE RECOGNITION PROGRAM

Effective: January 1, 2005

Last Revision: November 2015

### **Purpose**

Celebrate and support employees through recognition for exceptional service contributing to the agency's goals.

### **Why?**

Recognition fosters job satisfaction, builds self-esteem, and reinforces desired performance. It supports quality, strengthens trust and loyalty, and helps shape a culture that attracts and keeps the very best people. Recognition is about acknowledging good results and reinforcing positive performance; it's about shaping an environment in which contributions are noticed and appreciated. And this is a responsibility shared by **EVERYONE!**

### **Objective**

To recognize employees for the important role they have in fulfilling the mission and objectives of the agency.

### **Program Oversight**

The Senior Management Team, to include the General Manager, is accountable for the program, budget, and points awarded.

### **Award Categories:**

- *Community-minded:* highly motivated, customer-focused, community-minded acts committed to enhancing the quality of life for citizens, the general public, and other agency employees.
- *Outstanding Achievement:* performs a “Community-Minded” act that goes way above and beyond.
- *Efficiency:* initiates a program or work process that saves the agency money.
- *Excellence in Transit:* (annual award) individuals and teams who exemplify the agency’s mission, vision, and values.

Employees will also be recognized for:

- *Attendance:* being at work every day (other than for vacation or comp time).
- *Safety:* being committed to the safety of our employees, passengers, and the general public.
- *Longevity:* celebrating years of service with the agency.

### ***Community-Minded***

**Definition:** Highly motivated, customer-focused, community-minded acts committed to enhancing the quality of life for citizens, the general public, and other agency employees.

For examples: Acts of kindness; goes the extra mile; always volunteers to help; extends self for value-added service; adds quality to the work progress and process; demonstrates consistent “can do” attitude, participates in volunteer activities.

**Performance Measure:** % of satisfaction of internal and external customers.  
(Baseline: ridership surveys from DAL and FR).

### **Elements:**

1. Points: Letter, 5, 15, or 25 points determined by the Review Team upon review of the nomination form.
2. Letters to employee and personnel file: A letter signed by the General Manager will accompany each award. The Department Head, or designee, will personally distribute awards and/or letters. A copy of the letter will be placed in the employee’s personnel file.
3. Nominations: May be received in multiple formats, including recognition form available throughout the facilities; customer comment card; phone calls; letter or email.



## ***Outstanding Achievement***

**Definition:** Performs a “Community-Minded” act that goes way above and beyond, such as a heroic or courageous act.

**Elements:**

1. **Points:** 30, 40 or 50 *points*. Review Team will evaluate each situation separately then decide based on impact to agency.
2. **Letters to employee and personnel file:** A letter signed by the General Manager will accompany each award. The Department Head, or designee, will personally distribute awards and letters. A copy of the letter will be placed in the employee’s personnel file.
3. **Nominations:** May be received in multiple formats, including recognition form available throughout the facilities; customer comment card; phone calls; letter or email.

## ***Efficiency***

**Definition:** Initiates a program or work process that saves the agency money.

**Performance Measure:** *amount of agency funds/resources saved. (Baseline: department performance measurements).*

**Elements:**

1. **Points:** 5, 15, or 25 points determined by the Review Team upon review of the nomination form.
2. **Letters to employee and personnel file:** A letter signed by the General Manager will accompany each award. The Department Head, or designee, will personally distribute awards and letters. A copy of the letter will be placed in the employee’s personnel file.
3. **Nominations:** May be received in multiple formats, including recognition form available throughout the facilities; customer comment card; phone calls; letter or email.

## *Excellence in Transit*

**Definition:** Individuals and teams will receive this annual award for exemplifying the agency's mission, vision, and values. These individuals are highly motivated, customer-focused, and community-minded individuals committed to enhancing the quality of life for citizens, the general public, and other agency employees.

### **Elements:**

1. **Eligibility:** Nominations in all Recognition categories from June 1 to May 31 of each year will be considered for this award. All currently active employees who have been nominated are eligible for this award. Selection decisions will be made prior to June 30 of each year.
2. **Awards:** Honorees will receive:
  - \$100 each for individual awards; \$50 for each team member up to 8; if the team consists of more than 8 members, each member receives \$25;
  - A jacket, plaque, back pack, or clock with the "Excellence in Transit" award logo along with the Intercity Transit Logo.
  - A certificate signed by the General Manager and Board Chair;
  - A photo will be provided to local media and a news release to other outlets such as WSTA, blogs, etc. along with the acknowledgement of the award they've received;
  - Employees will be recognized at the annual Transit Appreciation Day event; and
  - If WSDOT holds a Wall of Fame banquet, the recipients will be included, as long as the budget allows.

## *Safety*

**Definition:** The safety of our employees, passengers, and the general public is of highest importance. Employees who operate safely will be recognized.

### **Elements:**

1. **Eligibility:** Those who drive or move equipment 165 days/year without a preventable accident/incident are eligible. All persons responsible for moving/driving an Intercity Transit vehicle are eligible including supervisory personnel. (Maintenance Supervisors opted out.)
2. **Awards:** Employees shall be recognized for achieving safe driving milestones for cumulative years and consecutive years. Cumulative points are given based on the number of years without a preventable accident/incident - there may be breaks in years of safe driving. Consecutive points are given for multiple years in a row of safe driving. The consecutive count will start over (reset to zero) if an employee is involved in a preventable accident/incident.

3. **Assessment Period:** Awards are calculated on a year-to-year basis based on the anniversary month of hire.
4. **Points:** 20 points will be awarded each year an employee has a year of safe driving without a preventable accident/incident. Additionally:

Consecutive Years			Cumulative Years	
Years	Points		Years	Points
5	50		5	25
10	100		10	50
15	150		15	75
20	200		20	100
25	375		25	187.5 200
30	450		30	225

5. **Distribution:** Awards for safe driving are given during the person's anniversary month. The Department Head, or designee, will personally distribute awards, certificates, pins and points.
4. **Safe Driving Reports:** Reports will be generated by Human Resources and the Operations Assistant.

**Agency Safety Recognition:**

Intercity Transit will recognize major milestones that are safety related.

**Attendance**

**Definition:** Regular attendance is essential to the efficient operation of the agency. Employees who demonstrate a level of dedication by choosing to be present each day at work will be recognized.

**Elements:**

1. **Eligibility:** Employees who are not absent from work, other than for vacation or comp-time are eligible. Employees absent from work due to sick leave or LWOP are not eligible. The use of LWOP is considered on an individual basis. LWOP will not be counted against an employee if used for:
  - Late report
  - Union business
  - Military leave
  - Reducing service holiday such as Christmas Eve
  - Leaving DAL run early (prior to 15-minute grace period)
  - Time off requested same day for reasons not covered under sick leave

2. Awards: Employees shall be recognized for achieving perfect attendance for each payroll quarter and annually. Annual awards are not based on a calendar year; an employee who has four quarters of perfect attendance in a row will receive recognition for one year of perfect attendance.
3. Assessment Period: Awards are calculated on a payroll quarterly basis; awarded quarterly and annually.
4. Points: 10 points will be awarded for each complete payroll quarter with no absenteeism. Additionally when a person achieves four quarters of perfect attendance, they will receive bonus points as follows:

Years	Points
1-4	50
5-9	100
10-14	150
15-19	200
20-24	250
25 or more	300

5. Distribution: Awards for perfect attendance are given each quarter. The Department Head, or designee, will personally distribute awards, certificates, and points.
6. Perfect Attendance Reports: Reports will be generated by Human Resources.

### *Longevity*

**Definition:** There is tremendous value in recognizing employees' commitment to the agency. Employees who stay with the agency will be recognized for having a deeper understanding of the agency's mission and vision and how their work contributes.

#### **Elements:**

1. Eligibility: All active employees are eligible.
2. Awards: Employees shall be recognized for achieving anniversary milestones.
3. Points:

Years	Points	Additional Items
5	25	n/a
10	50	n/a
15	75	n/a
20	100	Jacket, Plaque, or Clock
25	150	Jacket, Plaque, or Clock
30	200	Jacket, Plaque, or Clock
35	250	Jacket, Plaque, or Clock
40	300	Jacket, Plaque, or Clock

4. **Distribution:** Awards for longevity will be given during the person's anniversary month. The Department Head, or designee, will personally distribute awards, certificates, and points. Employees with 20 or more years of longevity will receive a special recognition by the General Manager and the Board Chair at TAD and at the Annual Banquet

## Other Recognition Pieces Included in the Program

- Annual Banquet - December
- Transit Appreciation Day - August
- Annual Service Anniversary Cards
- Names of those recognized each month will be included on the agency monitors. An employee leaving Intercity Transit has up to 30-days to cash in their recognition points. If they do not submit them within the 30-days, the points will defer back to the general fund of the agency.
- The General Manager can approve awards above program allowances with appropriate justification and documentation.

## Other

1. The Senior Management Team will review all nominations and determine the amount of points awarded for each nomination submitted. The Senior Management Team will also determine the Excellence in Transit awards.
2. **Point Value:** Points awarded are worth 1 point = \$1.00.
3. **Expiration:** Points will expire 5 years after award. All points are recorded as to date of award and number of points on the certificate. At the end of each year, those points not redeemed that have expired will be written off and no longer have value. Points are NOT TRANSFERABLE.
4. **Certificates:** Points may be redeemed for a Visa gift card. Employees are asked to complete a redemption form and submit it to the HR Department. Intercity Transit will absorb any fees charged for the purchase of Visa gift cards. An employee separating from employment will be paid for all points on the books, as of the date of their separation.
5. **Reports:** Program Administrator will provide employees with a report at the end of each calendar year showing total number of points remaining on the books, point value and a reminder of when their earliest points are due for expiration.

6. Dollar value will be reported for tax purposes when bonus bucks are cashed out. Reporting periods are June and December, unless an employee separates from service then will be reported on their last check.