

TO: Finance Committee

FROM: Sarah Olson, Human Resources

DATE: August 14, 2017

SUBJECT: Transit Parts Specialist Position Study

At the request of the Transit Maintenance Manager, Jeff Butler, I have studied the two 1.0 FTE positions of Transit Parts Specialist (CG 42, Range 8-position #2755 and #2891), currently occupied by Cynthia Moore and Erica Ehlert.

When conducting a position study, it is our responsibility to evaluate the duties and responsibilities assigned to a position and determine how those duties and responsibilities, and the associated levels of discretion, judgment and other factors, compare to other positions within the City's classification system.

The classification of Transit Parts Specialist is defined as:

...varied and responsible manual and clerical work in the operation of the Parts Unit of the Madison Metro Transit Utility. Under the general supervision of the Transit Parts Supervisor, employees in this class perform shipping and receiving, parts counter and inventory control duties, including heavy physical labor in stocking parts and supplies. Employees will be assigned a variety of Parts Unit functions as necessary.

The Parts unit is comprised of the two Transit Parts Specialists that report to a Transit Parts Supervisor.

The Transit Parts Specialist is expected to receive, unload and check in all freight, parts and supplies, and maintain a computerized inventory system by processing invoices, purchase orders and packing slips. The Parts Specialists are expected to answer parts related questions; look up part numbers in catalogues and issue or order parts as needed.

Since 2014, the Transit Parts Specialists have been given additional responsibilities including the purchasing of Metro's general departmental supplies directly from the various vendors, (previously done by a Transit Account Clerk 3, in CG42, Range 11). This includes the ordering of batteries for buses, relief vehicles, and oil from supply companies. In addition, there has been astronomical growth in electronic systems on buses that the Parts Specialists must have advanced specialized knowledge to help guide newer Mechanics with identifying needed parts. The growth in electronic systems required the Parts Specialists to learn a whole new parts system, a system that requires the correct part to be purchased or the new part could ruin the larger system (i.e. incorrect \$5,000 injector part could ruin a \$40,000 engine). The Mechanics let the Parts Specialists know what is needed, (or in some cases the Parts Specialists work with newer Mechanics through the issue and help identify the needed part) and from there the Parts Specialists are tasked with looking through multiple resource manuals in order to purchase the correct part. The increase in electronic systems and the growth of Metro has increased the parts sales from \$330,000 in 2007 to a parts sales value of 1.1 million in 2016.

Since January 2016, another addition to their duties has been the monitoring and management of the parts warranty administration. Previously, parts warranty administration was being completed by a Transit Maintenance Supervisor, (CG44, Range 8). Given the tasks on the Maintenance Supervisor position description, there was a lack of timely claim filing for parts needing replacement still covered under warranty. The lack of timeliness resulted in many claim denials and extra unnecessary costs to purchase brand new parts that could have been covered under warranty. In addition to timeliness, the data was not being entered properly, leading to a lack of accurate historical data to support whether a part was still covered under warranty. Given the Parts Specialists heavy involvement in parts ordering and keeping inventory, transferring the warranty administration was a logical move. Since then, the Parts Specialists have recovered almost \$72k in parts and labor warranty expenses.

The City has another similar position to the Transit Parts Specialist within the Fleet Services Division. The Fleet Parts Technician is in CG15, Range 6 and equivalent to CG42, Range 12. I met with Mr. Ron Janowski, Interim Fleet Services Superintendent to discuss the Fleet Parts Technician. There are three full-time Fleet Parts Technicians, one Parts Driver and a Fleet Parts Leadworker. A Fleet Parts Technician orders parts for a variety of vehicles and machines such as City vehicles, dump trucks, snow plows, lawn mowers, and refuse trucks. The Fleet Parts Technicians track warranty and inventory and have also experienced a need to grow in their technical knowledge as it relates to electronic systems. The Transit Parts Specialists focus primarily on bus parts whereas the Fleet Parts Technicians must have expanded knowledge on parts for a variety of vehicles and machines. Because of this broader knowledge requirement, I find it is appropriate that the Fleet Parts Technicians be classified at a higher salary range than the Transit Parts Specialists.

In addition to looking at comparable positions within the City of Madison, it is appropriate to review the Teamsters contract classifications that are in and above where the Transit Parts Specialists are currently classified. The incumbents referenced the Transit Account Clerk 3 in Range 11 as a position that HR should use for comparison reasons given the transfer of the purchasing that had previously been done and given now to the Parts Specialists. The class specification for a Transit Account Clerk 3 describes work as

...responsible advanced-level accounting clerical work in the preparation and /or processing of various documents and financial records. This work is characterized by significant judgment and discretion in completing assigned tasks or special projects with a high degree of independence under general supervision.

A Transit Account Clerk 3 performs the following duties

**Maintain and independently process records of income and disbursement in conformance with applicable rules, regulations and standards. Prepare reconciliations and journal voucher entries. Review a variety of financial documents and accounts for accuracy; locate and resolve issues.**

Assist Metro staff in the procurement of non-grant related supplies and services by providing support in identifying specifications and requirements, identifying and contacting vendors, preparing and processing appropriate procurement documentation and ensuring that all City of

Madison purchasing guidelines are followed. Prepare LPOs or POs for procurement transactions that do not fit the requirements for the use of a City of Madison P-card.

**Serve as Metro's primary resource for preparing, processing, evaluating and awarding non-grant related requests for bids, proposals and quotes. Serve as liaison with City of Madison purchasing staff when they are primarily responsible for bid, proposal and quote requests that affect Metro.**

Receive vendor statements and inquiries and research discrepancies and other issues.

Integrate/coordinate related accounting clerical activities.

**Prepare exhibits, financial summaries and letters for collection of accounts receivable; and review or prepare billing and supporting documents in the revenue recovery process.**

**Maintain the fixed assets inventory database, prepare monthly journal entries to record changes to fixed assets accounts in the general ledger and reconcile the fixed assets inventory database to the general ledger accounts. Post the monthly depreciation journal entry and review for accuracy. Prepare, organize and maintain files related to capital asset procurement to ensure complete documentation and adequate audit trail. Perform the periodic physical inventory of fixed assets and reconcile to the fixed assets database and general ledger. Assist in the development of the capital budget.**

Verify accuracy and completeness of all non-represented and represented office employees' timesheets and forward to payroll clerk. Investigate and respond to payroll related issues from employees, auditors, other City agencies, etc. Review represented employee time data and verify compliance with all related provisions of the labor contract. Assist employees with the Workers Compensation process and prepare WC related reports. Maintain manual record of AWOP and FMLA time used. Assist the primary payroll clerk with other activities as required

Perform other lower-level accounting clerical work as may be assigned. **[emphasis added]**

The purchasing duties transferred to the Parts Specialists were not the key responsibility that made the position of Transit Account Clerk 3 a range 11, but rather it is the accounting and financial duties required of the position, shown in bold above. Just as the warranty administration doesn't make a Transit Maintenance Supervisor position in CG44, Range 8 but rather what factors in the range is the supervisory work in directing, controlling and evaluating the activities of a group of workers engaged in the maintenance of transit vehicles and equipment.

I do believe the work of the Transit Parts Specialist classification has increased in terms of the technical knowledge required, and should be moved to a higher level than Range 8. In reviewing classifications in CG42, Range 9, there are the Transit Account Clerk 2, Metro Plus Scheduling Assistant and the Transit Operations Office Coordinator. I did not see a strong comparison of the same level of technical and specialized knowledge needed within these classifications to perform the work. While all three positions are very different in nature from the Transit Parts Specialists, the complexity with the electronic systems, the level at which the Fleet Parts Technician is classified and the additional programmatic authority over the warranty program indicates the Transit Parts Specialist is at a higher level. When reviewing range 11, the currently used classifications of Transit Graphics Technician and Transit Account Clerk 3 are identified as advanced level work characterized by significant judgment and discretion in completing assigned tasks or special projects with a high degree of independence under general supervision. While the Transit Parts Specialists are using judgment and discretion in ordering parts, they report to a Transit Parts Supervisor (CG 44, Range 5). The Parts Supervisor carries out activities such that competitive and cost-effective purchasing decisions can be made. The

Transit Graphics Technician and the Transit Account Clerk 3 both report to a Manager, (the Marketing and Customer Service Manager and the Transit Finance Manager, respectively) and both have technical school programs that directly relate to their work.

The Transit Parts Specialist position has grown in its level of technical and specialized knowledge required to perform the position with the massive increase in electronic components on Transit systems, which required learning a whole new parts system. When asked if filling this position if it were vacant, Mr. Butler would be looking for two years of experience in an automotive, truck, coach, implement, construction or similar motorized equipment parts department involving the responsibility for stocking, issuing and accounting for automotive/coach parts and maintaining computerized inventory records. Because of the positions discussed above, I recommend placement of the Transit Parts Specialist classification in range 10 in CG 42. While the Transit Scheduling/Data Assistant is the only classification in range 10 and very different work, both require at least two years of working experience.

Because of the reasons outlined in this memo, I recommend the Transit Parts Specialist in CG42, Range 8 be deleted and recreated as a Transit Parts Specialist in Range 10 and the incumbents be reallocated.

The necessary resolution to implement this recommendation has been drafted.

Editor's Note:

Compensation Group/Range	STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
42/08	\$1346.3859	\$1436.0967	\$1525.8914	\$1615.6757	\$1795.1707
42/10	\$1428.0911	\$1523.2754	\$1618.4808	\$1713.6862	\$1904.1074

cc: Gene Gowey – Business Agent  
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