TO: Personnel Board

FROM: Sarah Olson, Human Resources

DATE: July 27, 2016

SUBJECT: Transit Scheduling/Data Assistant Position Study

Transit General Manager Chuck Kamp and Metro Transit Planning & Scheduling Manager Drew Beck requested that I study the position of Transit Scheduling/Data Assistant in CG42, Range 10. Metro Transit requested that the position be studied to reflect increased independence in the performance of assigned duties and responsibilities, as well as broader work assignments of a professional nature. Over the years, planning and scheduling responsibilities with this position have increased to allow for the Schedule Planner to concentrate on long range route and schedule issues. In response to this request, I have completed my study of the Transit Scheduling/Data Assistant position. I spoke with Mr. Beck and the incumbent, Poorna Shivakumar. As a result, I recommend the following:

- Recreate position #4353 (currently occupied by P. Shivakumar) as a Transit Assistant Scheduler Planner (CG44, Range 07) which will be filled through an internal competitive process. Until that process is complete, Ms. Shivakumar will continue to under fill the position as a Transit Scheduler/Data Assistant and the Transit Scheduling/Data Assistant position will be deleted upon filling of the higher level position.

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 Planning unit at Metro Transit consists of two Transit Planners, a Transit Schedule Planner, and the Transit Scheduling/Data Assistant that all report to the Transit Planning & Scheduling Manager. Ms. Shivakumar started with Metro Transit in 2003 as a Transit Operating Technician (CG42, Range 5). She promoted to a Transit Scheduling/Data Assistant in 2011. The classification of Transit Scheduling/Data Assistant describes work as:

> …responsible technical and administrative support work involving the provision of assistance to the Transit Scheduler and the collection, summary, and analysis of transit data. This position has primary responsibility for scheduling and coordinating school year service for the Metropolitan Madison School District. The work is performed under the general direction of the Transit Scheduler, with assignments also received from the Transit and Scheduling Manager and transit planners. The work is reviewed for overall effectiveness and compliance with applicable laws, rules, standards, and labor and grant contracts.

The classification of Transit Assistant Schedule Planner describes

> … responsible professional, technical and administrative support work in design, implementation and monitoring of the City's bus routes and schedules, using a computerized scheduling system. Work includes collecting data about routes, detours, route performance, ridership and other route planning data in order to effectively write and coordinate schedules and cut and roster runs. The work is performed independently under the direction of the Transit Schedule Planner, and may

include developmental and long-range planning as well as day-to-day operational duties, analysis, reporting and problem solving.

When Ms. Shivakumar first started, her role was to collect, summarize and analyze transit data, consistent with the work described in the Transit Scheduling/Data Assistant class specification. She collected field and office data relative to peak load summaries, route performance summaries, maps of alternative routes and detours, service requests and other related ridership and route planning data. She was charged with developing routes and schedules for Madison schools, including monitoring school service for problems such as overcrowding or underutilization, which required making necessary adjustments. She was the liaison between Metro's Planning and Operations sections to relay information to dispatchers, drivers and passengers as needed.

In the last few years, in addition to the above job duties, Ms. Shivakumar has taken on increased independent responsibility in the areas of planning and scheduling. She manages the entirety of the transportation service provided for the Madison Metropolitan School District (MMSD). She creates driver assignments and manages the driver assignment selection. This involves her being the liaison with the school district including contact with the Director of Administrative Services for MMSD with route adjustments due to early dismissal needs. She plans and schedules supplemental school day routes under minimal oversight.

In addition, she determines the most efficient use of overload extra buses within the mainline service. This involves determination of most efficient driver and vehicle usage for dealing with overloads on fixed Metro routes. Whereas in the past, she was scheduling "extra board" weekly work in accordance with labor contract provisions, she is now independently analyzing the need of extra buses due to route performance, and taking this information to design, post, and supervise the extra board weekly work.

Her position has grown in technical need with the complex scheduling, run-cutting software, and databases that she now has mastered. Recently, she has been trained in a highly regarded driver assignment tool called Trapeze Blockbuster that Metro Transit will use for scheduling drivers for various routes. She currently uses SQL Server, Access, Excel, and Transit Master on a regular basis to schedule routes.

Traditionally, the Planning Unit has used the Transit Scheduling/Data Assistant classification as an entry-level position. However, as work has evolved and incumbents learn more about the scheduling, it is appropriate to study the position to determine whether the work has become more professional in nature. Through this study, I conclude that Ms. Shivakumar has been performing much of the professional work outlined in the class specification for the Transit Assistant Schedule Planner. Because of the reasons outlined in this memo, I recommend the recreation of position #4353 (currently occupied by P. Shivakumar) as a Transit Assistant Scheduler Planner (CG44, Range 07) which will be filled through an internal competitive process, as this would be a change in representation status for the position. Until that process is complete, Ms. Shivakumar will continue to under fill the position as a Transit Scheduling/Data Assistant and the Transit Scheduling/Data Assistant will be deleted upon filling of the higher level position.

cc: Chuck Kamp-Transit General Manager

Crystal Martin-Transit Service Manager
Drew Beck-Transit Planning & Scheduling Manager
Greg Leifer/Harper Donahue-Labor Relations