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**AC TRANSIT DISTRICT****Board of Directors**

Executive Summary

**GM Memo No. 09-237**

Meeting Date: October 14, 2009

**Committees:**Planning Committee External Affairs Committee Rider Complaint Committee **Board of Directors** Finance and Audit Committee Operations Committee Paratransit Committee **Financing Corporation** 

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**SUBJECT:** Report on Extraboard Policies**RECOMMENDED ACTION:** **Information Only**     **Briefing Item**     **Recommended Motion****Consider Receiving Report on the District's Extraboard Policies and Comparison to Other Transit Agencies**

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**Fiscal Impact:**

The cost of the District's extraboard operators is included in the annual budget, under Operator Wages.

**Background/Discussion:**

Transit agencies use what is called an "extraboard" or "extraboard operators" to cover work assignments that are not assigned to regular operators or to fill in when assignments become open, either for scheduled or unscheduled absences. Unlike an office job, for instance, which may be left open when the employee is absent, transit agencies seek to fill all open work on a daily basis so that service always operates as scheduled. AC Transit, like other transit agencies, has periodic signups, where operators select their work in seniority order, and they may either select a "regular run", in which case they know what their daily assignment will be, or they may select an extraboard assignment, in which case their assignment usually changes on a daily basis (some extraboard operators "detail" an assignment that is planned to be open for a longer period of time; in that case they fill a regular run until the detail expires).

The goal in correctly sizing the extraboard is to assign enough extraboard operators to minimize the need to use "day off" work (operators who make themselves available to fill open runs on their day off, thereby costing time-and-a-half), and yet not have unused extraboard operators who must get paid, but do not get an assignment.

The Transportation Research Board (TRB) Bus Transit Systems Committee requested a study that was commissioned by the National Center for Transit Research (NCTR) to study how transit agencies manage their extraboard resources and develop a tool to assist transit agencies to maximize those resources. The paper was presented at a TRB conference and

Director Peebles suggested that AC Transit staff review the paper and determine if the information could be helpful to the District.

The TRB study confirmed that extraboard sizing in the transit industry is currently more an art than a science. Based on responses from 35 agencies, including large, medium-sized, and small agencies, the authors concluded that most systems rely on experience and prior knowledge to manage their extraboards and do not make extensive use of data on absenteeism or other factors. In this respect, AC Transit is similar to other systems. Another finding of the study is that there are unique variables associated with most transit agencies that complicate a standardized modeling approach. However, the study concluded that a model developed and used by Dallas Area Rapid Transit (DART) is more comprehensive than what most agencies use, because it not only calculates the optimal size of the extraboard, but extends further to determine optimal workforce sizing based on categories of attrition and new hiring. Further, they believe that the spreadsheet can be easily tailored to individual transit agencies.

District staff, as noted above, has sized the extraboard based on historical experience about what seems to work best in terms of balancing extraboard operators and day off work. Although the District's attendance rates, particularly in sick leave, have improved significantly over the past year, most divisions still use "day off" work on a regular basis. That figure has decreased, though, and the current year budget for operator overtime was reduced by about \$0.6 million from the FY 08-09 budget of \$9.7 million (it should be noted that the overtime budget includes scheduled overtime as well as unscheduled overtime, and the reduction comes solely from unscheduled overtime). However, recently staff has begun looking at the extraboard size more rigorously, in light of the need for budget reductions, to determine if there is a more efficient way to size or allocate the resources.

To assist in this exercise, staff has reviewed the DART template recommended in the TRB report, and has begun customizing the categories for the District's system. The spreadsheet relies on historical data, some of which is fairly readily available at the District, and some will be more difficult to gather. Staff is currently attempting to collect data for the past year, which, if available, will be very helpful in determining the optimal size of the extraboard, as well as to assist in determining hiring levels for new operators. When this work is complete, staff will report the conclusions to the Board in the General Manager's quarterly report.

**Prior Relevant Board Actions/Policies:**

None

**Attachments:**

Attachment 1: Optimal Operator Report (developed by DART, with modifications to date for AC Transit)

**Approved by:** Rick Fernandez, General Manager  
**Prepared by:** Kathleen Kelly, Chief Transportation Officer  
**Date Prepared:** October 6, 2009

**OPTIMAL OPERATOR REQUIREMENT REPORT**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg.			
<b>Scheduling Requirements*</b>																
Total Fulltime Runs																
Extraboard Assignment and Frags																
Group Reliefs																
<b>Total Scheduled Operator Requirements</b>																
<b>Operations Extraboard Requirements</b>																
Leave Over 6 Months																
Industrial Injury																
Sick																
Leave																
Military Leave																
Funeral Leave																
Admin. Leave																
No Medical																
No License																
Public Relations																
Work Out of Position																
Trauma																
Excused to Union																
Excused to Committee																
Excused Other																
Suspended																
Jury Duty																
Birthday / Floating Holiday																
Vacation																
Casual Vacation																
Training Department																
<b>Total Operations Extraboard Requirement</b>																
<b>Percentage extraboard</b>																
<b>Turnover— # as of end of month</b>																
Terminations																
Promotions																
Transfers to Train																
<b>Total Turnover</b>																
Transfers from Train																
<b>Percentage Turnover</b>																
<b>Optimal Number of Operators</b>																
<b>Current Number of Operators</b>																
<b>Students in Training, Graduating Next Month</b>																
<b>Required Recruitment Level</b>																
<b>Projected Hires in Current Month (hired or cleared to hire as of report date)</b>																
<b>* Data from Scheduling Department TR38 Report</b>																

GM Memo 09-237, Attach. 1