

# **WORK EXPECTATIONS**

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# **PROCEDURES MANUAL**

**Last Updated: March 20, 2017**

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## Preface

This *GoTransit Regional Information Center (RIC) Work Expectations & Procedures* manual was recommended by our Department Director, Mr. John Tallmadge of Regional Services Development to ensure efficient and appropriate orientation of the Regional Information Center. We are an entity of the GoTriangle Regional Services Development department. Portions of the existing *GoTriangle Policy Manual* have been restated in this manual, for the advantage of the employee. If there is conflict of information within these guidelines and the *GoTriangle Policy Manual*, please consult with the Customer Service Manager for clarification and/or verification on the governing policy.

This manual was created as a guideline to ensure safe, effective and efficient operations of the RIC, as well as other related customer service tasks. As a professional customer information associate, employees must apply their best judgment at all times when carrying out their job duties. It is also imperative that employees know and follow the expectations, rules, procedures and guidelines outlined in this manual. Doing so guarantees:

- The safety of customers, employees, the general public.
- The security and proper operation of GoTriangle equipment.
- The provision of quality service that meets or exceeds customers' expectations.

Full consideration and implementation of these objectives are a requirement for continued employment and departmental advancement. Employees may be required to pass periodic examinations of these work expectations and procedures. Disobedience or disregard of work expectations, procedures, processes, guidelines, rules, or instructions from the proper authority/supervisor will be considered insubordination and shall result in progressive corrective action.

This manual does not house every circumstance and situation that will be encountered while working in the Regional Information Center. However, it will provide a model for the decision making process. Please take time to review this manual in its entirety to bring awareness of any guidelines as they pertain to you while working in this department.

These work expectations and procedures may be amended, changed, modified, revised and/or updated at any time. Notification will be communicated via email and postings within the GoTransit Regional Information Center. Clarification of the work expectations and procedures or suggestions for changes to this manual (especially with regard to safety or service improvement) should be submitted through the Customer Service Manager.

Each employee will be issued a hard copy of this manual and will be required to sign the state of receipt and acknowledgement of the work expectations and procedures. In addition, this manual will also be available in PDF format on the intranet web site as well as on the Projects Drive in the CSR Tools and Resources folder.

## Welcome

Dear Valued Team Member,

On behalf of your colleagues, we welcome you to the *GoTransit Regional Information Center* “RIC” and wish you the very best in success here!

We believe that each employee contributes directly to the RIC’s growth and success. We hope you will take pride in being a member of our team. We are delighted you have joined our staff of transit professionals. The minute you start working here, you become an integral part of the RIC and its future. Every member of our team is important and you will play a key role in the continued growth of our center.

RIC is committed to providing accurate and efficient information services to our passengers in the most professional, courteous and friendly manner possible. Your job will be to join us in our endeavor to serve the needs of our passengers by providing a high quality reliable customer experience. We achieve this by treating each other and our customers with the upmost level of respect.

We hope that your experience here will be challenging, enjoyable and rewarding. Again, welcome aboard and remember let’s offer our all on every call!

One Team! One Goal!

Sincerely,

The GoTransit Regional Information Center Leadership Team

## GoTransit Regional Information Center

### Purpose

The *GoTransit Regional Information Center* (RIC) is a cooperative function between GoTriangle, the city of Durham (GoDurham), the city of Raleigh (GoRaleigh), the town of Cary (GoCary) and the town of Chapel Hill (Chapel Hill Transit). The GoTransit Regional Transit Information Center provides a single source of information about public transportation services, ridesharing and paratransit services throughout the Triangle by allowing customers to make one call via 919-485-RIDE (7433). Through this multi-agency partnership, the GoTransit Regional Information Center provides comprehensive transit information of a consistently high quality that is relied upon by our current and future customers.

The Regional Information Center is staffed during adverse weather events, except in conditions when all of the participating agencies have announced that they will not be operating their services.

The two primary technology systems utilized within the Information Center are Google Transit (*Trip Planner*) and Transloc (*Real Time Tracking System*). Most of our pertinent resources are located/found on the (Projects) P-Drive in the CSR Tools and Resources Folder. Please visit our website <https://gotransitnc.org/> daily for pertinent information.

### Tasks

The Regional Information Center is responsible for providing the following services on a daily basis (but not limited to):

- Planning transit trips
- Fare and schedule information
- Real-time bus status
- Transit agency policy information
- Entering and submitting customer feedback (i.e. complaints, comments, etc.)
- Emergency Ride Home program information
- Paratransit information and sending applications
- Provide Lost and Found information/processes for all partner agencies
- Processing route and informational brochure requests
- Rideshare (carpool/vanpool) information
- Operate GoTriangle's Customer Service Office, pass sales, identification cards, parking decals, lost and found

### Goals

- Provide professional, courteous and accurate information to all customers.
- Answer 95% of all incoming calls within 30 seconds.
- Maintain an average handle time of 1 minute, 40 seconds (100 seconds).
- Enter and submit all customer feedback within 24 hours of receipt.
- Mail all bus schedule requests within 24 hours of receipt. (Ensure adequate postage & legible handwriting)

### Contact Information

Website: <https://gotransitnc.org/>

Phone: 919/485-7433

Email: [info@gotriangle.org](mailto:info@gotriangle.org) and/or [customerservice@gotriangle.org](mailto:customerservice@gotriangle.org)

## Mobile Access

There are several ways to get access to the real-time information while on the go:

<http://triangle.transloc.com/info/mobile>

- [Apps](#) for Apple and Android devices
- [Mobile Web](#) for mobile or less capable devices
- [SMS Text Messaging](#) for all phones

## **Job Descriptions & Responsibilities**

### **Customer Service Manager**

The Customer Service Manager is responsible for managing the operations of the RIC and for planning and managing projects to improve operation of the center. Essential duties and responsibilities include:

- Manages and leads assigned staff, including but not limited to hiring, providing motivation, enforcing disciplinary actions, terminations and performance evaluations in accordance with GoTriangle policies and procedures.
- Establishes performance standards for the Regional Information Center consistent with the goals of all partner agencies.
- Develops the short-range customer service plans (5-year scope) to ensure timely and appropriate response to customer information and service needs.
- Prepares the annual Regional Information Center budget.
- Manages the implementation of projects that improve representatives' ability to respond quickly to a diverse customer base with varied informational needs.
- Coordinates customer service activities, information and programs with (but not limited to) other local transit agencies.
- Maintains factual documentation of all Information Center activities.
- Update the Interactive Voice Response system.
- Responds to customer's information requests or escalated concerns/complaints that cannot be resolved by CIA's, Customer Information Coordinator or the Regional Information Center Supervisor.
- Disseminates incoming information from other departments to appropriate staff to ensure that accurate information is provided to customers.
- Prepares monthly, quarterly, and annual reports of the Regional Information Center performance.
- Maintains the Regional Trip Planner, including checking daily for feedback, errors and proper function. Initiates annual updates to the schedules, street networks and maps through coordination with the local transit agencies.
- Maintains customer service information on the GoTriangle.org and/or GoTransitNC.org web sites.
- Provides Riders Alerts, using printed materials, email service, voicemail messages, and other innovations.
- Maintains the customer feedback management databases used by the Regional Information Center, including monitoring to ensure that all cases are handled and customers receive a timely reply, and coordinating updates to the databases.
- Performs other duties as assigned.

## **Customer Service Supervisor**

The Customer Service Supervisor is responsible for managing the day-to-day functions of the Regional Information Center. This individual is the primary supervisor of the Customer Information Associates (CIA's) I & II. Essential duties and responsibilities include:

- Establishes performance goals and standards for the Information Center and its employees.
- Plans for and implements procedures and processes to ensure the Information Center functions at a level that accommodates the needs of the region.
- Develops assigned staff through hiring, retention, performance management and training that follows agency policy, procedures and practices.
- Trains Customer Service employees on the proper use of the trip planning equipment and on how to respond appropriately to requests, especially those that involve additional clarification.
- Creates and maintains the employee work schedule.
- Coordinates activities that include the best practices of customer service; networks with other transit agencies to ensure GoTriangle stays abreast of the latest trends.
- Documents and maintains information center traffic data, analyzing activity levels, complaints and overall service provided; makes adjustments in work flow when necessary.
- Receives elevated customer service problems that cannot be resolved at the C.I.A II level.
- Prepares and disseminates reports on the amount of calls received; service responses and issues of which Management would have an interest.
- Maintains the GoTriangle Customer Feedback Management System, including monitoring to ensure all cases are being handled and customers are receiving a timely reply of coordinating updates to the system.
- Establishes new sales outlets and relevant fare media data with the Bus Operations.
- Performs other duties as assigned and requested.

## **Customer Information Coordinator**

The Customer Information Coordinator supports the organization objective of providing world class customer service by performing quality control evaluations and providing support for transit related services. Responsibilities include but not limited to:

- Monitoring calls for accuracy of information and quality standards; ensuring Associates are delivering a high level of customer service and are providing accurate solutions to customers.
- Recording observations utilizing departmental quality monitoring forms.
- Providing staff with regular performance feedback on observations.
- Making recommendations on corrective actions or performance management steps needed to address quality issues.
- Preparing and analyzing reports for Management review at the individual, team and agency levels.
- Working with leadership to plan, develop, implement and evaluate quality assessment practices and future training needs.
- Responding to requests for the Emergency Ride Home (ERH) program by confirming qualifying events and eligibility.
- Utilizing Share the Ride NC (STRNC) to confirm accounts and entering ERH user information and tracking as needed.
- Coordinating and dispatching the ERH service provider.
- Reviewing and monitoring programs for abuse or incorrect invoicing.

- Posting transit alerts to the TransLoc Announcements service, relating to bus breakdowns; traffic conditions; adverse weather conditions and events that can cause delays to bus schedules.
- Monitoring various computerized tools for real-time issues in anticipation of missed or delayed trips.
- Performing other duties as assigned and requested.

### **Customer Information Associate II**

The Customer Information Associate II is responsible for responding to non-routine and routine calls and information coming through the Regional Information Center from the general public. Essential duties and responsibilities include:

- Establishes lead representative status as a customer service resource.
- Answer incoming calls in a friendly, helpful manner via a multi-line phone system and provide information to the public at the GoTriangle Customer Service Pass Sales Office.
- Trains Customer Service employees on the proper use of the trip planning equipment and on how to respond appropriately to requests, especially those that involve additional clarification.
- Assists the Customer Service Coordinator in Monitoring Customer Information Associate I's performance, provides assistance and coaching as needed.
- Handles routine information requests and complex and non-routine, escalated customer calls in need of further clarification regarding a request.
- Receives and records customer feedback consistent with procedures.
- Operates all types of office equipment as needed including a Point of Sales system.
- Coordinates proper inventory of all fare media at Regional Information Center.
- Administers cash register system; including reconciliation of cash versus sales.
- Responsible for stocking schedule brochure racks at various locations.
- Disseminates information from other departments and the Regional Customer Service Supervisor to appropriate staff ensuring customers receive accurate information.
- Maintains regular reports on phone call performance, customers served and level of quality of service.
- Resolves elevated service complaints or concerns, via phone, written or email correspondence.
- Performs other duties as assigned and requested.

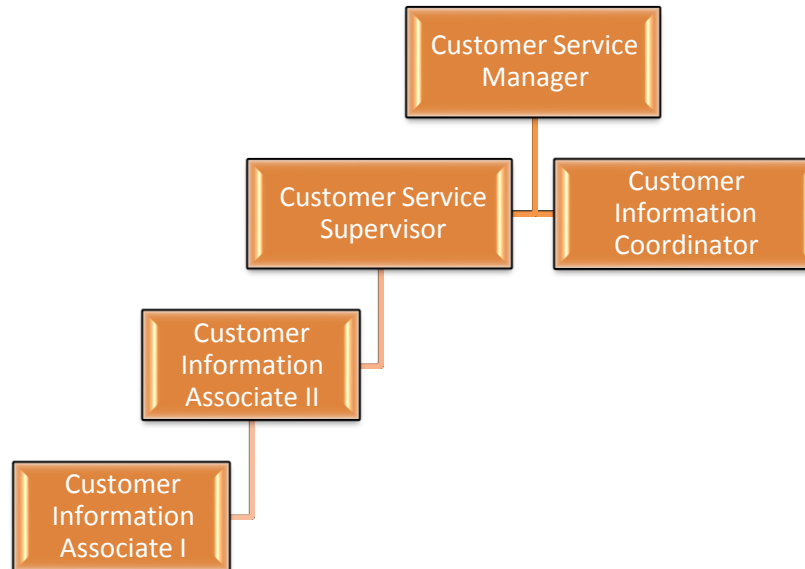
### **Customer Information Associate I**

The Customer Information Associate I is responsible for responding to non-routine and routine calls and information coming through the Regional Information Center from the general public. Essential duties and responsibilities include:

- Provide information for the public regarding local transit services, programs, and schedules.
- Provides information to the public regarding paratransit and ridesharing services.
- Answer incoming calls in a friendly, helpful manner via a multi-line phone system and provide information to the public at the GoTriangle Customer Service Pass Sales Office.
- Sell Regional fare media using a computerized cash register system; process cash, check and credit card purchases; process daily reports for purchases.
- Mail schedules upon request.
- Track service complaints and perform other record keeping tasks.
- Process online purchases of regional fare media and other promotional items sold on the website.
- Maintains proper inventory of published service brochures.
- Operates all types of office equipment as needed including a Point of Sales system.
- Perform other duties as assigned and requested.



## Organizational Chart



### Chain of Authority:

- The Customer Service Supervisor is in charge of ALL day-to-day operations within the Information Center.
- In the absence of the Customer Service Supervisor, the Customer Information Associate II is the acting supervisor. (Shift Supervisor, Shift Lead, Shift Coordinator, Supervisor on Duty/S.O.D.)
- In the absence of both the Customer Service Supervisor and the Customer Information Associate II's, employees shall report important matters to the Customer Service Manager and/or Customer Information Coordinator.

### The 2017 Regional Team

*Manager* – Katina Kinder

*Supervisor* – Aaren Landrum

*Customer Information Coordinator* – Tierany Griffin

*Customer Information Associates II (Team Peers)* – Juan Alencastro and Bernadette Parrish

*Customer Information Associates I* – Jessean Banks, LaShay Beulah, Alison Byrd, Adrienne Coles, Eulinda Gooden, Scarlett Guerrero, Steven Forbes, Reginald Hinton, Wankisha Jenkins, Matthew Levell, Monique Lopez, Kerisha Pettiford, Maria Sanchez, Rebeca Sanchez, Amber Warren, Samantha Webb

## Code of Conduct

- **Work as a Team!**
- **Be respectful of all:** The minimum professional behavior expected from employees is to respect all who work in the organization.
- **Be respectful of difference of opinion:** No two employees are the same, thus we must be respectable and considerate of everyone's point of view.
- **Comply with policies and procedures**
- Be positive about your workplace and co-workers. If you have concerns, you are expected to meet privately with your Manager or Supervisor to discuss or respectfully express them in an appropriate setting.
- Avoid all sorts of sexual harassment conduct like:
  1. Commenting and looking at someone or his/her specific body parts.
  2. Commenting about sexual activity.
  3. Narrating adult and sexual jokes.
- Be helpful to co-workers.
- Come well dressed & practice professional etiquette.

### Tips on Work Etiquette

Apart from the above-mentioned etiquette, there are other codes of behavior that one should maintain while a member of the RIC team. These are:

- Be on time.
- Be enthusiastic.
- Keep shared workspaces tidy.
- Maintain your personal cleanliness.
- Cultivate a positive attitude towards others.

## Personnel Practices

### Communication / Dissemination of Information

In addition to these work rules and procedures, special instructions / notices are issued on a regular basis, either verbally from members of the supervisory staff, or in writing in the form of e-mails, inter-office mailings, or posts to the customer service web site. It is each employee's responsibility to review and request clarification (if needed) for such information. All such verbal instructions or written bulletins will take precedence over applicable portions of this manual.

### Employee Training

GoTriangle, along with partnering transit agencies of the Regional Information Center, is committed to training for each employee. These training programs are designed to improve agent skills, increase productivity, and expand employee knowledge. The goal in the training is to encourage high quality performances throughout the Regional Information Center and the entire organization. Before employees are allowed to interact on their own with customers, we ensure that the necessary training has been accomplished.

- Individuals who fail to attain minimum training standards during the initial training period will be subject to termination.
- Attendance is mandatory for all refresher-training classes, when required by the Customer Service Manager or Customer Service Supervisor.

## Corrective Action

Employees may be subject to corrective action, suspended, reduction in hours or dismissed without warning for violations of the *Go Triangle Policy Manual* and/or the departmental *Work Expectations and Procedures Manual*. Corrective action may be for individual actions or inactions, by the employee; a result of multiple actions or inactions by the employee; or a result of job performance below standards, for a period of time. The severity of corrective action may vary from warning to termination depending upon the nature of the infraction, employee's work history and job performance, when judged below standards.

An employee performing below job standards may also be subject to corrective action and a ninety day probationary period. The following are, but not limited to, examples of below-standard job performances that may result in disciplinary action, reduction in hours, including suspension or termination. They are:

- Inability to meet work standards; as defined by the job description and measured by Management.
- Failure to report fit for duty; meaning equipped, healthy and drug/alcohol free.
- Demonstrated inefficiency, negligence or incompetence in the performance of duties.
- Habitual improper use of leave privileges.
- Habitual pattern of failure to report for duty at the assigned time and place.
- Discourteous treatment of the public, co-workers or supervisors.
- Insubordination
- Working under the influence of alcohol or an illegal drug.
- Misrepresentation of time worked.
- Boisterous or unprofessional behavior in the workplace, on the bus or while representing Transit in a public event.

All corrective action/counsel will be recorded in writing on a GoTriangle Corrective Action Form and shall be signed by the manager, supervisor and employee; or in written correspondence to the employee signed by the manager, supervisor or department head. Signature by employee does not mean agreement, only acknowledgement that the corrective action or counseling has occurred.

## Attendance

### Key and Essential Personnel

Key and essential personnel are those needed to operate, maintain, and supervise the transit program and to provide customer information concerning the operating services of the partnering agencies. All key and essential personnel must maintain good attendance based on GoTriangle's Departmental Work Rules & Procedures Manual. Excessive call-outs as defined in the Work Rules Manual will result in progressive disciplinary action.

### General Information

All employees are required to be logged into all work systems at the start of their assigned work shift and are expected to be logged until the end of their shift. Employee time will be tracked /paid by Nettime. When in sync with phone log-in time, employee on-time performance will be measured by their log in/off time in the phone system, as well as customer engagement.

## **Schedule Compliance and Adherence (Call Outs/Time Off)**

Employees may request time off work by filling out and submitting an *Employee Request for Leave* form. Once submitted, the request must be approved by the RIC Supervisor and/or Manager. Request approval is not automatic. Absence approvals are based upon available help, circumstances related to absence, and the employee's prior work record. If an absence is not approved and an employee fails to report to work, they may be considered for no-call/no show.

Anytime an employee requests to be off and has not filled out the proper documentation, it is considered a call-out. A call-out occurs when an employee contacts the supervisor on duty to state that they are unavailable to report for their scheduled assignment. A call-out may occur the night before a scheduled shift assignment or the day of. The reason for call-outs may vary (sickness, personal issues, etc.). If an employee is unable to report to work, it is his/her duty to personally notify the Department Manager (i.e. the employee must make contact and communicate with the Manager) Call-ins/Call-Outs by family members, friends, or messages left on voice mail are not acceptable.). Extreme circumstances may warrant an exception, but must be approved by the Department Manager. All call-outs are reported and recorded on a daily basis.

All employees are expected to be in compliance with their unique shift schedules at all times. It is your responsibility to adhere to your assigned work schedule. Should you have any last minute requests (car trouble, illness, meetings etc.) it is expected that you will make every effort possible to reach out to your peers to see if they are available to pick up your shift for you and/or switch shifts. This is designed to help you avoid any unnecessary occurrences as well as it assists the Leadership Team in ensuring there is adequate staff coverage for the inbound call volume.

### **Late Reporting**

A late report will be given whenever an employee is required to report for scheduled work and fails, for whatever reason, to arrive later than five minutes of the scheduled shift time. All late reports are recorded on the Daily Supervisor Report.

If an employee is unable to report to work on time it is his/her duty to notify supervisor on duty personally (i.e. Employees must talk with the supervisor personally. Calls by family members, friends, or messages left on voice mail are not acceptable.). Extreme circumstances may warrant an exception, but must be approved by supervisor on duty, if required notice of inability to report on time is given. Failure to arrive at the scheduled time or notify supervisor on duty within the required time will be considered a late report. All late reports will be reported to the Customer Service Supervisor.

### **Impact of Call-Outs and Late Reports on Performance Evaluation**

The following formula displays how call-outs and late reports affect an employee's "Attendance" score in their annual performance evaluation. It is done based off the expectation that an employee will not exceed 12 call-outs and/or late reports per year (see below). Employee call-outs and late reports will be measured each quarter of their annual performance period.

**Expected Total Call-Outs & Late Reports per Year = 12**

**Expected Total Call-Outs & Late Reports per Quarter = 3**

Scoring will be calculated on a quarterly basis. The table below shows how the quarterly score is calculated.

**Quarterly Scoring Formula:**

Total # of Call-Outs & Late Reports	0	1	2-3	4 or more
<b>Performance Score</b>	<b>10</b>	<b>8</b>	<b>6</b>	<b>4</b>
Performance Description	Exceptional	Exceeds Expectations	Meets Expectations	Below Expectations

\*If an employee has no call-outs or late reports for the quarter they receive a perfect ten for attendance.\*

The average performance score for all four quarters will be used as the employee’s “Attendance” score on their annual performance evaluation.

*Example:*

The chart below shows how the employee, “Joe’s” attendance score is calculated for his annual performance evaluation. Joe’s annual score, to be inserted in his performance evaluation is 8.0, indicating that for the entire year, his attendance exceeded expectations.

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
# of call-outs	0	1	0	2
# of late reports	0	0	0	3
Total call-outs & late reports	0	2	0	5
<b>Performance Score</b>	<b>10</b>	<b>8</b>	<b>10</b>	<b>4</b>
<b>Average Annual Score</b>	<b>8.0</b>			

**NOTE:** Medical issues (employee or family member), family emergencies (approved by the manager or supervisor) and personal matters that require the employee to call-out multiple days in a row are considered extenuating circumstances and will be treated as one (1) call-out.

FMLA leave, jury duty leave, and bereavement leave (approved by the supervisor or manager) are not considered call-outs and will not be used in calculating the employee’s performance score.

**Progressive Disciplinary Action for Excessive Call-Outs and Late Reports:**

1. If an employee has 4 or more late reports or call-outs for any one quarter, then they will move to the progressive discipline of corrective with a 90 day follow-up period that requires no call-outs and/or late reports. Failure to comply will result in the next step of corrective action.
2. If an employee has received a performance score of “4” (Below Expectations) for four (4) consecutive quarters, then the employee will receive an average score of “4” on their annual performance evaluation impacting any expected raise and a Ninety-Day work plan requiring no call-outs and/or late reports. Failure to comply will result in a resolution as suggested by the Department Manager.

## **Absent Without Leave (AWOL)**

AWOL is defined as an absence about which the applicable supervisor has not been notified by the employee personally or an absence **not approved** by the supervisor on duty. Each day of AWOL shall be treated as a separate occurrence and the employee will be subject to corrective action as follows:

- A. First occurrence - suspension without pay for three (3) days
- B. Second occurrence - suspension without pay for five (5) days
- C. Third occurrence – Discharge.

## **Illness/Sickness**

A. If employees are unable to work because of sickness, it is their **responsibility** to personally notify the Manager and on-duty Supervisor of their inability to work. Employees are required to: (1) provide personal notice to both the Manager and the on-duty Supervisor and (2) provide notice **at least 60 minutes prior** to their scheduled reporting time. The Regional Information Center telephone directory where all supervisors can be reached before, during and after business hours is located on the P-drive in the CSR Tools and Resources folder.

B. Employees who have called out sick must notify the on-duty Supervisor of their ability to work the following day. Notice must be given no later than 12:00 p.m. Employees must provide notice of inability to work for every day of sickness, unless they have submitted a doctor's note that includes the date on which they are able to return to work. The doctor's notice must be submitted upon return to work or sooner, depending on circumstances. The note must state the period of time an employee is unable to work. Employees who are out on sick leave, greater than three days, must be reported to Human Resources. If advance notice is not given call-outs are recorded for each day of absence. (Please refer to Call-out sub-section in the Appendix.).

C. Absences due to sickness will be closely observed. If a noticed pattern, such as Friday, Monday or in conjunction with a day off is detected, the employee will be subject to corrective action.

D. After three (3) absences due to sickness in a six (6) month period, a doctor's note may be required. Physician notification may be requested anytime at the discretion of the employee's Supervisor. This notification is to be obtained, at the employee's own expense, from a family physician or any other authorized medical institution. For each workday missed, due to failure to provide this documentation, the employee will be considered AWOL and subject to appropriate corrective action.

## **Vacation & Holiday Sign-Up Procedures**

### *Vacation Requests of Five (5) Consecutive Days or Greater:*

Employees shall sign up for vacation leave (for 40 consecutive hours or more) at the beginning of each calendar year, provided they have "banked" the hours and have them available at the time of the leave. These vacation requests shall be submitted by February 1, and will be assigned on a first-come/first-serve basis. To ensure adequate staffing throughout the year, the supervisor will approve no more than 2 employees for vacation (of 40 consecutive hours or more) during the same time frame.

### *Vacation Requests of Three (3) – Four (4) Consecutive Days:*

Employees requesting three (3) to four (4) consecutive vacation days shall submit their request to the supervisor, no less than 60 days in advance of the requested time off.

*Vacation Requests of One (1) – Two (2) Consecutive Days:*

Employees requesting one (1) to two (2) consecutive vacation days shall submit their request to their supervisor in their monthly work/shift schedule request (See “Work Schedule/Shifts” below).

*Holiday Sign-Up Procedures:*

At the beginning of each calendar year, employees shall have the opportunity to sign up to work on the following holidays:

- Memorial Day
- Fourth of July
- Labor Day
- Thanksgiving Day
- Christmas Eve
- New Year’s Day (the following calendar year)
- MLK Jr. Day (the following calendar year)

All holiday work requests are to be submitted by February 1<sup>st</sup> and will be assigned on a first-come/first-serve basis. All remaining shifts will be solicited (volunteers) a month before the Holiday and assigned by the supervisor, based on the following factors:

- Priority shifts will be granted to employees who did not work the same holiday the previous calendar year, and
- Shifts will also be assigned based on seniority.

The following days for the GoTransit Regional Information Center Staff are considered “normal work days” and will be scheduled accordingly with a business as usual shift:

- Good Friday
- Day after Thanksgiving

## **Working Guidelines**

### **General Information**

Employee violations and procedural infractions are considered serious. Discipline factors, including severity of incident and violation and previous work history, will determine corrective action result, ranging from warning to discharge.

The following factors are also of prime importance and must be adhered to:

### **Work Schedule/Shifts**

The monthly work/shift schedule of Customer Information Associates shall be determined by the second-to-last Monday of the previous month. Employees are to submit their schedule requests (for the upcoming month) to the

supervisor by the COB on the Friday prior to the designated Monday of the month. The supervisor will specify when employees' schedule requests are due each month.

**Please note: Some schedule requests will not be accommodated, due to the staffing needs of the information center.**

Once the master schedule is complete for the upcoming month, it is FINAL. Once the schedule is final, if employees wish to take a scheduled work day off, they must swap shifts with a co-worker. If both employees agree to a shift swap, a written notice must be submitted to the supervisor. Please note: Posted schedules will not be updated until all written requests have been submitted. If swapping shifts will result in overtime for one or both employees, pre-approval is required by the Customer Service Supervisor. All employees are expected to be in compliance with their unique shift schedules at all times. It is your responsibility to adhere to your assigned work schedule. Should you have any last minute requests/emergencies (car trouble, illness, meetings etc.). It is expected that you will make every effort possible to reach out to your peers to see if they are available to pick up your shift for you and/or switch out shifts. This guideline is designed to help you avoid any unnecessary occurrences as well as it assists the Leadership Team in ensuring there is adequate staff coverage for the inbound call volume. The Staff directory is accessible on the P-Drive.

### **Breaks**

Customer Information Associates working (full and part-time) who work an 8-hour or greater shift are allowed the following breaks during their shift:

- One (1) one-hour lunch break (un-paid)
- One (2) fifteen minute rest breaks (paid)

Customer Information Associates working between a 4-8 hour shifts are allowed the following breaks during their shift:

- One (1) 30-minute lunch break (un-paid)
- One (1) fifteen minute rest break (paid)

Customer Information Associates working a 4-hour shift or less are allowed the following breaks during their shift:

- One (1) fifteen minute rest break (paid)

**When going on break, Customer Information Associates must log out of the phones. All other times, Customer Information Associates are expected to be logged into their phones and ready to answer calls. Personal breaks will be accounted as a 15-minute rest break or lunch break. Bathroom breaks do not require the employee to use any official break time, but will be monitored for excessiveness. If you do not have a Medical condition and are taking excessive restroom breaks throughout your shift, you are forfeiting the company paid fifteen minute break and should deduct the time accordingly.**

### **Cellular Telephone Usage**

Limited cell phone use is allowed while working in the Regional Information Center. Personal cellular phones must be turned off or on "silent" during working shifts. Talking on or texting on a cell phone during a customer call is strictly prohibited. Also, talking on or texting on a cell phone instead of answering a customer call is strictly prohibited. Both offenses are considered a serious violation and can result in progressive corrective action. Employees may use their break time (see "Breaks" above) to talk on their cell phone, but it must be done outside of the information center. Texting is allowed, but only if the employee is not on a phone call or receiving an incoming customer call.



## **Food and Beverage**

**All employees are prohibited from talking on the telephone or conducting face-to-face contact with customers while chewing gum, or consuming food or drink.** If the customer information associate is utilizing a shared work space, then he/she must be courteous to other employees by cleaning up any mess and discarding litter.

### *Food or Beverage at the Customer Service Window:*

All employees are prohibited from eating food, candy, or chewing gum when in face-to-face contact with customers at the customer service window. Beverages are permitted, as long as they are in a sealable or lidded container.

### *Food or Beverage at Employee's Desk:*

Employees are allowed to have food and drink at their desk. However, beverages must be in a sealable or lidded container. In addition, food and beverage should be placed on a location of the desk that is not near the computer, telephone, or any other electronic equipment.

## **Personal Appearance**

Being a Customer Information Associates is a public, high visibility job that requires neat, well-groomed, and professional appearance. Acceptable dress code for employees is considered "Casual". After 5:00pm and on Friday, Saturday and Sunday of each week, employees may dress down which includes jeans. Employees shall NOT wear jeans with holes, nor t-shirts with controversial or offensive content. (Evening and Weekend Dress Down is a privilege.)

All clothing worn must fit properly. The employee will be expected to keep clothing clean and wrinkle-free. Failure to keep clothing neat and clean, and to wear them properly, may be considered unsatisfactory job performance.

## **Handling Money / Using the Cash Register**

All Information Center employees will be trained in the proper standard operating procedures for handling money and fare media. Each employee will be accountable for opening and operating the point of sales system (cash register) and closing out the register at the end of their shift. Stealing, misrepresenting or misappropriating money or fare media are grounds for immediate termination.

## **TELECOMMUTING (WORKING REMOTELY)**

### **GoTriangle POLICY STATEMENT**

GoTriangle is committed to providing a work environment that supports its Work/Life Balance policy. This includes making it possible for an employee to telecommute by performing a percentage of work remotely. Some employees may find great benefit in working remotely. An employee who believes that he/she can perform productive work activities remotely should discuss telecommuting with the supervisor. This arrangement requires a great deal of discipline by the employee and consistent monitoring by the supervisor. Employees who are granted telecommuting privileges, as part of a regular work schedule, must work with the supervisor through the manager to ensure approval. An employee must not be on any corrective action and/or progressive discipline. Working remotely will be considered for up to sixteen (16) hours per week, the equivalent of two days. GoTriangle does not support telecommuting in excess of 16 hours per week. Employees who propose telecommuting must have at least six months of tenure. The Telecommuting arrangement may be terminated at the sole discretion of the supervisor if a determination is made that the employee either cannot handle the responsibilities of working from home or the work justifies more direct supervision.

## Severe Weather Policy

### Purpose

The public expects that bus services, along with our normal departmental activities, will operate during severe weather. The most likely severe weather conditions to expect include icing, snow and sleet accumulation, severe thunderstorms, hurricanes, flooding and tornadoes. Triangle Transit will make every effort to insure that transit services are disrupted as little as possible. This plan applies to all Triangle Transit staff and outlines the actions to be taken to fully comply with its requirements.

### Severe Weather Procedures

GoTriangle employees will report to their normal department and work area. However, if the severe weather plan is in effect individual members may be required to offer assistance as necessary and required to other departments. Please prepare for all possibilities. Specific tasks are assigned to selected individuals.

### Reporting Procedures

Authority offices and departments shall remain open for the full scheduled workday in the event of severe weather. When extreme weather conditions occur it may be necessary to deviate from this policy and from the GoTriangle regular service schedule or even temporarily discontinue bus service. To determine operational status please call 485-7469 and if there is any deviation from the normal work schedule the recorded message will explain this and will inform what employees and when employees will report to work. During Severe weather conditions, Personnel whose positions are not designated as key and essential may, with their supervisor's approval, take unscheduled vacation leave or make the work hours up within the pay period. Authority personnel designated as key and essential personnel are required regardless of weather conditions to use the utmost caution in traveling but report for work at or before their normal work times and work their full schedule. Key and essential personnel (hourly) who do not report as scheduled will not be paid for each workday missed. Key and essential personnel (salary) who do not report as scheduled will be required to make-up missed work within the pay period and may be subject to disciplinary action. **The only exception is if the recorded message specifically indicates that key and essential personnel are not to report.** Key and essential personnel are indicated below.

### Key and Essential Personnel

Key and essential personnel are those personnel that are needed to operate, maintain, and supervise the transit and vanpool program and to provide customer information concerning the operating services of Triangle Transit. Each designated manager/supervisors must keep an updated copy of the contact phone number(s). The following personnel have been determined to be key and essential:

1. General Manager
2. Director of Bus Operations
3. Operations Manager
4. Bus Operators, Supervisors and Training Coordinator
5. Transit Manager
6. Bus Maintenance Manager
7. Parts & Inventory Coordinator and Assistant
8. Bus Maintenance Supervisor, Mechanics and Service Attendants
9. Vanpool Manager
10. Vanpool Mechanic

11. Director of Finance and Administrative Services
12. Systems Administrator
13. Communications Officer
14. Customer Information Associates
15. Customer Information Coordinator
16. Customer Service Manager
17. Customer Service Supervisor

If for some reason the phone system is out of order the following personnel should contact their immediate supervisors at their cell phone numbers as indicated below:

- Katina Kinder                    919-457-2116 – Customer Service Manager
- Aaren Landrum                910-431-4401 – Customer Service Supervisor
- John Tallmadge                919-672-3862 – Back-up for Customer Service Manager

## Call Handling /Key Performance Indicator Standards

### Purpose

The Regional Information Center’s primary purpose is to serve the transit information needs of the public. To customers, we are one of the first introductions to using public transportation in the Triangle region. We have an obligation to facilitate a first-rate experience for potential customers as well as current customers. Therefore, Customer Information Associates are expected to adhere to the following call handling standards to ensure customers receive a first-rate experience.

The following call handling standards will be used to measure an employee’s soft and hard skills when on the phone, and will assist the Leadership Team in identifying strengths, weaknesses, and areas that require coaching. Moreover, these standards will have a direct impact on an employee’s annual performance review.

### Standards/Goals

#### *Call Opening/Greeting:*

- Customer Information Associates will answer an incoming call within three (3) rings
- Customer Information Associates will answer the call by saying, “Thank you for calling GoTransit, how may I help/assist you?” “Thank you for calling GoTransit, what city are you located in and/or trying to get to?”
- Customer Information Associates will NOT miss an incoming (ringing) call.

#### *Effectively Listening to the Customer:*

- Customer Information Associates will ask probing questions to properly understand the customer’s question/needs.
- Customer Information Associates will repeat information back to the customer for confirmation.
- Customer Information Associates will NOT interrupt the customer.

#### *Using a Positive / Professional Tone of Voice:*

- Customer Information Associates will speak clearly.
- Customer Information Associates will be respectful to the customer at all times.

- Customer Information Associates will NOT use a sarcastic or patronizing tone of voice.
- Customer Information Associates will avoid using slang.
- Customer Information Associates will NOT eat, drink or chew gum while on the phone with a customer.
- Customer Information Associates will adjust their voice to the customer's temperament.
- Customer Information Associates will use proper body language (i.e. sit up straight, do not cover mouth with hand).
- Customer Information Associates will not have unnecessary background noise while on the phone with a customer (i.e. talking to a co-worker, TV, personal tablets, laptops, radio, cell phone, etc.).

*Sound Knowledgeable, Confident & Informed:*

- Customer Information Associates are expected to be confident in locating and communicating information to the customer.
- Customer Information Associates will give clear, concise, and accurate answers to the customer's question(s).
- When giving a customer a departure time, Customer Information Associates will ALWAYS tell the customer a time that is five (5) minutes before the predicted departure time.

*Putting Customers on Hold / Transferring Calls:*

- Customer Information Associates will ALWAYS ask the customer if they can put them on hold before putting the customer on hold.
- Customers will not wait on hold for more than one (1) minute before the Customer Information Associate comes back on the line with an update and/or explanation.
- When returning to a customer that was on hold, Customer Information Associates will thank the customer for waiting.
- When transferring a call, the Customer Information Associate will warm transfer the call to the appropriate staff. (i.e. partner agencies paratransit services, lost and found offices)
- When transferring a call to a co-worker or staff at partner agencies, the Customer Service Representative will first provide the individual with an explanation before transferring the customer to them.

*Controlling the Call / Taking Ownership:*

- Customer Information Associates will NEVER transfer a customer call to a co-worker or back to the queue to avoid taking the call.
- Customer Information Associates will try to assist a customer or resolve a problem before transferring the call.
- Customer Information Associates will avoid lengthy, unnecessary conversation with a customer.
- Customer Information Associates will offer callers alternatives (e.g., mail schedules, call the customer back when call volumes are lower, etc.) if the customer is talking too long or rambling on (over 8 minutes).

- Customer Information Associates will keep call length under seven (7) minutes, unless the call is from an irate person and/or customer requiring additional assistance during non-peak hours.

*Closing the Call:*

- Customer Information Associates will NEVER hang up on a customer.
- Customer Information Associates will ask customers if they need further information/assistance before ending the call.
- Customer Information Associates will ALWAYS thank the customer.

## Employee Performance Monitoring & Coaching

### Purpose

The Regional Information Center is committed to effectively and consistently monitoring and coaching Customer Information Associates to ensure that:

- Customer Information Associates receive individualized coaching, tailored to their strengths and weaknesses.
- Supervisory staff quickly identifies and resolves problems in employee performance.
- Customer Information Associates receive regular and frequent communication about their performance
- Annual Performance Review – Evaluates the overall individual performance of the Customer Information Associate.

### Monitoring

- Employee attendance, call outs, breaks will be monitored on a daily basis and recorded in the daily supervisor’s log.
- Employee call handling skills will be monitored on a weekly basis and entered into the agent evaluation system.
- The Customer Information Coordinator will consistently monitor the agent evaluation system to ensure that persons are effectively, consistently, and objectively monitoring and evaluating Customer Information Associates’ performance.

### Coaching

- The Customer Information Associate II will coach employees on a bi-weekly basis, based on the areas identified in the agent evaluation system that require improvement.
- All Coaching will be done internal, starting with the Customer Information Associate II and/or followed up with the Customer Information Coordinator.
- The Customer Information Coordinator will meet with each employee on an as needed and monthly basis.
- The Customer Service Supervisor will meet with each employee on an as needed and monthly basis.
- The Customer Service Manager will meet with each employee on a quarterly basis to discuss employee performance, needs, goals and objectives.

## **Annual Performance Review**

The GoTriangle overall Performance Factors for Annual Reviews are categorized but not limited to the following ten components:

- **Adaptability**
- **Attitude**
- **Communication**
- **Attendance**
- **Conduct**
- **Initiative/Judgment**
- **Interpersonal skills**
- **Job Knowledge**
- **Work Quality**
- **Work Quantity**

## **Acknowledgments & Appreciation Recognitions**

The Regional Information Center is a work place that acknowledges employees for going above and beyond the expected job duties. Customer Information Associates will be recognized on a monthly/quarterly basis for excellent performance, for such things as:

- Exhibiting Exceptional Call Handling and/or Customer Service Skills
- Commendations from Customers and Colleagues
- Coming to Work When Not Scheduled to Assist the Information Center Staff
- Spearheading Special Projects or Assignments that Exceeds Expectations (Subject Matter Experts, Customer Service Week)
- Improvements in Skills That Enhances Job Performance
- Innovations and Improvements that Result in Cost Savings or Increased Efficiency.

In addition, the entire Regional Information Center will be rewarded when meeting or exceeding team goals.

## Employee Acknowledgment of Work Expectations & Procedures

I hereby acknowledge receipt of the GoTransit Regional Information Center / Customer Service Work Expectations and Procedures revised August 31, 2016.

I understand that I have the opportunity to go over and discuss with management any material contained therein and have my questions adequately answered. I further understand that it is my responsibility to comply with these expectations and procedures and that my failure to do so may result in corrective action up to and including termination of employment.

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EMPLOYEE NAME

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EMPLOYEE SIGNATURE

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DATE