

To: Wake Transit TPAC

From: Shelby Powell, Project Manager, Wake Transit Staffing Model & Expectations Plan

Date: Feb. 7, 2018

Re: FY 18 Wake Transit Work Plan Q2 Amendment Requests – FTE positions

---

At its last meeting, the TPAC requested that the Staffing Plan Core Technical Team review the FTE positions being requested by CAMPO and GoTriangle as amendments to the FY 18 Wake Transit Work Plan. CAMPO staff reviewed the draft Staffing Plan report (the final report is not yet available) against the amendment requests and found that all positions being requested generally agree with recommendations contained in the draft Staffing Plan report. **As Project Manager of the Staffing Model & Expectations Plan, I recommended that this information be reported to the TPAC along with a recommendation to approve all requested positions in the proposed FY18 Q2 Amendments.** A caveat to that is that the request by GoTriangle to add 1.0 FTE BRT Engineer was withdrawn, so that position was not included in our analysis.

Only one Staffing CTT member offered feedback contrary to the recommended position. Wake County feels that the request by GoTriangle for a 0.4 FTE Data Analyst position is not an appropriate addition at this time.

Following is the analysis from CAMPO:

At their January meeting, the TPAC discussed several amendment requests from CAMPO and GoTriangle that included requests for new staff to perform Wake Transit tasks. The TPAC referred the review of these amendments to the Staffing Plan CTT for a review. As we still do not have a final Staffing Report (I'm expecting that by the end of this week), we must utilize the recommendations contained in the draft Staffing Report as sent to the Staffing Plan CTT on Jan 10 for this exercise. As we discussed at our last Staffing Plan CTT meeting, I do not anticipate major changes in the actual recommended staffing levels to change from that last draft to the final report, but there should be a better organization of the information that makes it more straightforward and clear as to where the recommendations come from, what levels of staffing should be anticipated when, and what should be more consultant-driven staffing versus full time agency staff.

FTE's Requested in the FY 2018 Wake Transit Work Plan Amendment:

GoTriangle:

- 1.0 FTE – Budget & Financial Manager
- 0.5 FTE – Tax District Administrative Assistant
- 1.0 FTE – Paralegal
- 1.0 FTE – Wake Transit Program Director
- 1.0 FTE - Wake Transit Administration Coordinator
- 0.4 FTE – Performance Data Specialist

CAMPO:

- 1.0 FTE Wake Transit Program/Project Manager

---

- 1.0 FTE Transit Planner

I've asked Adam Howell to review the amendments proposed against the recommendations for the Staffing Plan. Please note, in the original amendment request, GoTriangle had requested a 1.0 FTE BRT Engineer position; that amendment request has been withdrawn, and is not included in this analysis. Generally, the position duties and FTE's requested as amendments do agree with the draft staffing plan. Please be reminded that, as we discussed at the last Staffing CTT meeting, the Staffing Plan report is meant to serve as a guideline for anticipated staffing levels based on what work tasks and workloads we see in existence today as well as what we anticipate based on expanding bus services, growth in the CFA program, and experience from our peer agencies who have expanded transit options. Here's the position-by-position rundown:

GoTriangle:

- 1.0 FTE – Budget & Financial Manager: There is a discrepancy within the staffing plan draft report on this position. A table in the report says this should be a 0.5 FTE, but the text says it should be 1.0 FTE. We anticipate, based on comments passed to the consultant, that this will be rectified to show a 1.0 FTE. Position description and assigned duties generally agree between the amendment request and the staffing plan draft report.
- 0.5 FTE – Tax District Administrative Assistant: There is a discrepancy within the staffing plan draft report on this position. A table in the report says this should be a 0.5 FTE, but the text says it should be 1.0 FTE. We anticipate, based on comments passed to the consultant, that this will be rectified to show a 1.0 FTE. Position description and assigned duties generally agree between the amendment request and the staffing plan draft report. This position is referred to as the Finance Administrative Assistant in the staffing plan draft report. GoTriangle has indicated that, at present, there is only a need for this position to be supported as a 0.5 FTE through Wake Transit, with the other 50% of the position being funded through other sources.
- 1.0 FTE – Paralegal - There is a discrepancy within the staffing plan draft report on this position. A table in the report says this should be a 0.5 FTE, but the text says it should be 1.0 FTE. We anticipate, based on comments passed to the consultant, that this will be rectified to show a 1.0 FTE. Position description and assigned duties generally agree between the amendment request and the staffing plan draft report. The staffing plan draft report assigns this position as a function of Tax District Administration, whereas the amendment request assigns this function as Transit Plan Administration.
- 1.0 FTE – Wake Transit Program Director – This position is referred to in the staffing plan report as “GoTriangle Program Manager.” The 1.0 FTE and the position description and assigned duties agree between the amendment request and the staffing plan draft report.
- 1.0 FTE - Wake Transit Administration Coordinator - This position is referred to in the staffing plan report as “GoTriangle Administrative Coordinator/Assistant.” The 1.0 FTE and the position description and assigned duties agree between the

---

amendment request and the staffing plan draft report. There may be some overlap in duties between this position and the tax district administrative assistant, above, although the former position should be primarily focused on tax district administration duties while this position should be primarily focused on project / program management responsibilities of GoTriangle.

- 0.4 FTE – Performance Data Specialist – This position is referred to in the staffing plan report as “Performance Data Analyst.” The Staffing Plan recommends .25 FTE, while the amendment request is for .40 FTE. The duties and responsibilities and position description generally agree between the amendment request and the staffing plan draft report. The amendment request does outline additional specific responsibilities for this position to manage, track and monitor service quality metrics and to make recommendations regarding strategic decision-making, which goes beyond what is outlined in the staffing plan draft report. GoTriangle anticipates funding this 1.0 FTE with 40% Wake Transit funds and 60% other sources.

CAMPO:

- 1.0 FTE Wake Transit Program/Project Manager – This position is referred to in the staffing plan report as “Wake Transit Program Manager.” The 1.0 FTE and the position description and assigned duties agree between the amendment request and the staffing plan draft report.
- 1.0 FTE Transit Planner – This position is referred to in the staffing plan report as “CAMPO Entry-Level Transit Planner/Administrative Assistant.” The 1.0 FTE and the position description and assigned duties generally agree between the amendment request and the staffing plan draft report.

As you can see, there are only minor discrepancies between the requested FTE positions and the draft staffing plan report. Adam’s more detailed report follows this memo.

## Staffing Model and Expectations Plan & FY 2018 2<sup>nd</sup> Quarter Amendment Request Comparative Summary

Table 1: FTE Allocation Comparisons between Amendment Requests and Draft Staffing Plan

Amendments	Staffing Plan
<b>Tax District Administration</b>	
1.0 FTE Budget & Financial Manager	0.5 FTE Budget & Financial Manager
0.5 FTE Tax District Administrative Assistant	0.5 FTE Finance Administrative Assistant
<b>Transit Plan Administration</b>	
1.0 FTE Wake Transit Program/Project Manager (CAMPO)	1.0 FTE Wake Transit Program Manager (CAMPO)
1.0 FTE Transit Planner (CAMPO)	1.0 FTE CAMPO Entry-Level Transit Planner/Administrative Assistant (CAMPO)
1.0 FTE Paralegal	0.5 FTE Paralegal (grouped under Tax District Administration)
1.0 FTE Wake Transit Program Director	1.0 FTE GoTriangle Program Manager
1.0 FTE Wake Transit Administration Coordinator	1.0 FTE GoTriangle Administrative Coordinator/Assistant
0.4 FTE Performance Data Specialist	0.25 FTE Performance Data Analyst

**Commented [HA1]:** The text narrative contradicts the table for FTE allocations as presented in the Tax District Administration section (4.5.2) of the latest Staffing Plan draft

**Commented [HA2]:** Same issue applies here as highlighted above for the Budget & Financial Manager position

**Commented [HA3]:** This position is classified under Tax District Administration in the latest Staffing Plan Draft. Thus, the same issue applies here as highlighted above for the Budget & Financial Manager position.

### Comparative Summary by Position

#### **Tax District Administration**

##### **Budget & Financial Manager**

Amendment Request and Staffing Plan FTE Allocation Table DO NOT AGREE

Amendment Request and Staffing Plan described position responsibilities generally AGREE.

- o Staffing Plan lays out specific responsibilities, including primary listed roles of managing financial reporting/modeling as well as budget management tasks
- o Amendment Request generally states it will manage the Wake Transit Plan budget development and financial reporting

##### **Tax District Administrative Assistant**

Amendment Request and Staffing Plan FTE Allocation Table AGREE

Amendment Request and Staffing Plan described position responsibilities generally AGREE

- Staffing Plan lays out specific responsibilities, including primary listed roles of processing invoice paperwork and scheduling meetings internally for Wake Transit finance needs.
- Amendment request states that this position will assist GoTriangle finance department with Wake Transit activities, as well as coordinate meetings for internal Wake Transit finance needs.

**Transit Plan Administration**

***Wake Transit Program/Project Manager/CAMPO Program Manager***

Amendment Request and Staffing Plan FTE Allocation Table AGREE

Amendment Request and Staffing Plan described position responsibilities generally AGREE

- Staffing Plan lays out specific and prescriptive responsibilities for this position to manage tasks that are within CAMPO's assigned responsibilities as a part of Wake Transit Governance.
- Amendment Request states that this position will manage technical aspects of CAMPO's involvement with Wake Transit Implementation, as well as represent CAMPO's interests on Wake Transit initiatives through TPAC and affiliated subcommittee functions.

***Wake Transit Entry-Level Transit Planner/Administrative Assistant***

Amendment Request and Staffing Plan FTE Allocation Table AGREE

Amendment Request and Staffing Plan described position responsibilities generally AGREE

- Staffing Plan lays out specific responsibilities for this position to coordinate meetings and communication of said meetings, as well as provision of planning and research support on any and all planning studies and programs through Wake Transit.
- Amendment Request states that this position will support the functions of both the Wake Transit Program/Project Manager/CAMPO Program Manager and the TPAC Administrator through administrative and planning support needs.

***Paralegal***

Amendment Request and Staffing Plan FTE Allocation Table DO NOT AGREE

Amendment Request and Staffing Plan described position responsibilities generally AGREE

- Staffing Plan lays out specific responsibilities relating to development of project-level agreements for Wake Transit initiatives, as well as monitoring reporting and performance needs of agreements.
- Amendment Request states that this position will support legal aspects of the Wake Transit Plan, and facilitating the contract process for both Wake partners and GoTriangle's Wake Transit-related projects.

***Wake Transit Program Director/GoTriangle Program Manager***

Amendment Request and Staffing Plan FTE Allocation Table AGREE

Amendment Request and Staffing Plan described position responsibilities AGREE

- Staffing Plan lays out general responsibilities relating to overall development and coordination of GoTriangle's planning initiatives around major studies, as well as annual work plan components.
- Amendment Request identifies responsibilities for this position to be focused on managing all of GoTriangle's Wake Transit program responsibilities and activities including program planning, process development and budget/finance activities.

**Wake Transit Administration Coordinator/GoTriangle Administrative Assistant/Coordinator**  
Amendment Request and Staffing Plan FTE Allocation Table AGREE

Amendment Request and Staffing Plan described position responsibilities generally AGREE

- Staffing Plan lays out general responsibilities relating to supporting both tax district administration and planning/project management roles associated with administration of transit plan implementation through GoTriangle.
- Amendment Request identifies responsibilities for the position to provide administrative support for scheduling/planning Wake Transit/GoTriangle associated meetings, as well as administrative support for project planning, budget development and monthly management of reporting/financial needs.

**Commented [HA4]:** Upon further reading, this appears to duplicate some of the tasks identified through the Tax District Administration's Admin Assistant.

Performance Data Specialist/Analyst  
Amendment Request and Staffing Plan FTE Allocation Table DO NOT AGREE

Amendment Request and Staffing Plan described position responsibilities generally AGREE

- Staffing Plan simply defines three roles for this position, which include quarterly/annual reporting, integration of reporting data and compilation of said data.
- Amendment Request identifies more specific responsibilities for the position to manage, track and monitor service quality metrics/standards and make recommendations to enable strategic decision-making in support of Wake Transit based on the data analysis.

**Commented [HA5]:** GoTriangle is seeking 40% funding of this position from Wake Transit; 60% funding from other sources (Which will be confirmed/explained by GoTriangle at TPAC meeting if needed)