

COVID-19 Impact Analysis

Wake and Durham Bus Plans

December 2021





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1 – Overview & Key Findings

Overview

Stay-at-home orders, changes in commute patterns, and labor shortages caused by the COVID-19 pandemic have resulted in lower ridership and a shortage of bus operators at transit agencies in the Triangle Region and across the country. This document presents a summary of these COVID-19 related impacts to ridership on Triangle Region transit services, issues around bus operator retention and hiring, and strategies to address these challenges.

As people return to work, public health concerns ease, and traffic gets back to prepandemic levels, transit ridership is expected to return. The extent to which the transit agencies in the Triangle Region experienced declines in ridership has varied widely. Following an analysis of monthly ridership changes by service provider, this report dives into the socioeconomic characteristics of the residents within each agency's service area to gain insight into why some agencies' ridership is returning more quickly than others. These insights inform this report's recommendations related to short-term service planning to better serve the post-COVID transit market.

Bus operator shortages are another issue that transit agencies are facing as the Triangle Region's economy recovers. As this report describes, increases in private sector wages and public health and childcare concerns have made it difficult to attract and retain bus operators. To identify strategies to address this shortage, transit service managers from five peer agencies located across the United States were interviewed. This report summarizes the findings from this peer study. These strategies may prove useful as models for Triangle Region agencies who are experiencing similar challenges with finding operators and expanding the bus operator staff pipeline.

APPROACH

In order to understand the extent to which transit ridership has been affected by the COVID-19 pandemic, the project team analyzed and visualized National Transit Database and agency data. These findings are represented alongside a summary of

market analysis findings related to service area socioeconomic factors to suggest some potential reasons why ridership recovery has been uneven across the region. Specifically, the study team focused on socioeconomic characteristics that are related to transit propensity.

For the bus operator shortage peer review portion of this analysis, the study team interviewed staff from the following five transit agencies in order to gather national perspective related to this issue as well as a menu of potential options for improving bus operator hiring, retention, and training:

- Charleston Area Regional Transportation Authority (Charleston, SC region)
- Trinity Metro (Fort Worth, TX)
- StarTran (Lincoln, NE)
- · StarMetro (Tallahassee, FL)
- Suburban Mobility Authority for Regional Transportation (Detroit, MI region)

KEY DATA SOURCES

Data for the COVID-19 impact analysis comes primarily from the following sources:

- National Transit Database Monthly Module Adjusted Data (September 2021)
- GoCary

Maps in this report show data at the Transportation Analysis Zone (TAZ) level.

Key Findings

The key findings of the COVID-19 Impact Analysis are as follows:

- The pandemic caused a rapid and sustained decline in ridership across the country.
 Those who have continued to ride transit are primarily essential workers, and research shows that these individuals are more likely to be low income, lower levels of education, people of color, and have no access to a vehicle.
- In the Triangle Region, robust ridership returns have occurred on GoRaleigh,
 GoDurham, GoCary, and GoTriangle services. These four operators serve a larger
 number of people who rely on transit population than many other transit agencies in
 the US, and by maintaining most service levels and eliminating fares, have continued
 to serve essential workers during the COVID-19 pandemic. In some university areas in
 the Triangle Region, ridership growth has been much slower.
- Moving forward, transit in the Triangle Region can best serve its core riders by
 providing all-day, frequent service between neighborhoods with higher transit
 propensity and the region's service and retail jobs, which are located throughout the
 region, but especially concentrated in Raleigh, the northern part of Durham, and along
 many major highways.
- Another consequence of COVID-19 is widespread shortages of bus operators that have begun to affect the ability of some agencies to maintain scheduled service levels.
 Our peer review revealed three main obstacles around hiring additional operators:
 - 1. A lack of applicants to job postings
 - 2. Widespread safety concerns among potential applicants about interacting with the public for prolonged periods
 - 3. Scheduling concerns among potential applicants with school-age children as major obstacles they face around hiring additional operators.

- To address operator shortages, peer agencies have implemented wage increases, safety-related improvements, more nimble scheduling and excused absence policies, CDL training and renewal benefits, easier-to-operate routes, and more "straight-8" (rather than split) operator schedules.
- When agencies must reduce service due to operator shortages, low-frequency and coverage services are cut first and many agencies have focused resources on strengthening their all-day frequent network.
- Longer-term strategies for expanding the hiring pipeline of bus operators include community college partnerships and in-house childcare.



Newly trained GoTriangle bus operators celebrate graduation (Source: GoTriangle)

2 – Ridership Impacts of COVID-19

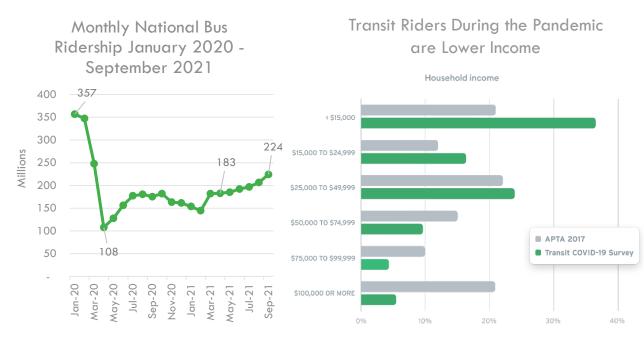
Bus Ridership Impacts of COVID-19 Nationally

As COVID-19 case loads accelerated across the United States in March 2020, most governors declared stay-at-home orders for residents of their states by the end of March 2020. Most stay-at-home orders directed people to stay at home except to visit essential businesses. As a result of these orders and widespread fears around contracting the virus, bus ridership in the US fell at a dramatic pace.

Bus ridership in April 2020 was 30% of the January 2020 monthly total. Only 107.9 million trips were taken on buses in April, down from about 356.9 million trips in January. Recovery since this initial wave of stay-at-home orders has trended upward, but inconsistently. In April 2021, national bus ridership had recovered to 42% (about 182.8 million trips) of January 2020 ridership. The second half of 2021 has seen more steady progress in bus ridership; September 2021 ridership was a COVID-era high of 65% (about 224.2 million trips) of pre-COVID-19 ridership.

Who has continued to ride transit during the COVID-19 pandemic?

Research shows that working from home during the COVID-19 pandemic is mostly a privilege of people with higher incomes, who have also left public transport in larger numbers. Lower income workers still need to leave their home to reach their workplace, and, additionally, they often rely on public transport as the only suitable transport option. Further, even when not able to work from home, higher income users might have access to a different mode or reduce their out-of-home activities by, for instance, shopping online. Those who continued to ride transit were primarily "essential workers," and essential workers, academics have found, are largely low-income; they rely on transit to commute to work. Researchers found that "high-income areas saw a decreased ridership of more than 19% compared to low-income areas (77% for high-income vs 58% for low-income at their respective lows)." Another study found statistically significant evidence that "lower-income, less educated, and people of color are continually riding transit during the COVID-19 pandemic."



Income was a good predictor of likelihood to take transit during the pandemic because "lower-income households had less discretion over the amount of travel they carried out during the pandemic." Relatedly, because lower-income households are less likely to own a car, whether a household has "access to a household vehicle ... has implications for the differential impacts that different groups of transit riders faced during the pandemic."

Sources: Hu, Songhua, and Peng Chen. "Who left riding transit? Examining socioeconomic disparities in the impact of COVID-19 on ridership." Transportation Research Part D: Transport and Environment 90 (2021): 102654.

Parker, Madeleine EG, et al. "Public transit use in the United States in the era of COVID-19: Transit riders' travel behavior in the COVID-19 impact and recovery period." Transport Policy 111 (2021): 53-62.

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Transit App. https://archive.transitapp.com/whos-left-riding-public-transit-hint-it-s-not-white-people-d43695b3974a Wilbur, Michael, et al. "Impact of COVID-19 on public transit accessibility and ridership." arXiv preprint arXiv:2008.02413 (2020).

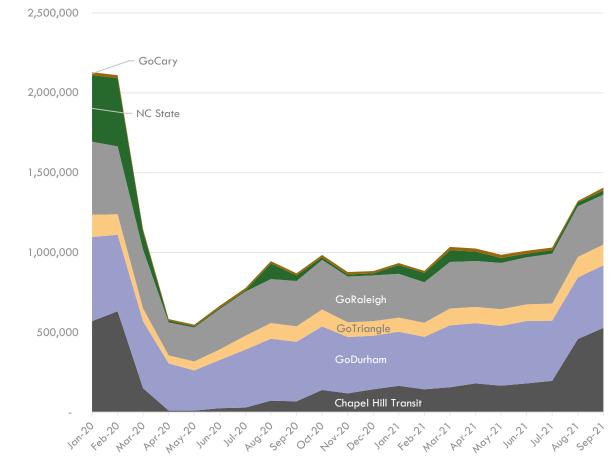
Bus Ridership Impacts of COVID-19 in the Triangle Region

North Carolina's Governor Roy Cooper ordered residents of the state to stay-at-home in order to slow the spread of COVID-19 on Saturday, March 27, 2020. The order provided for essential businesses to operate while prioritizing social distancing measures, and defined essential businesses as healthcare facilities, utilities, first responders, groceries, drug stores, gas stations, hardware stores, hotels, and many other service-related industries. Similar to the national experience, bus ridership dropped rapidly soon thereafter.

Overall bus ridership on Triangle Region service operators reached its nadir in May 2020, when 550,162 bus trips were taken on GoCary, NC State Wolfline, GoRaleigh, GoTriangle, GoDurham, and Chapel Hill Transit services. Ridership in May 2020 was only 25% of pre-COVID-19 (January 2020) levels. Overall, monthly ridership has trended upwards but unevenly since May 2020. In May 2021, monthly bus ridership was 46% (985,790 trips) of January 2020 levels. Since the beginning of the 2021 school year, ridership has returned more rapidly. In September 2021, the month with the most recent ridership data available, there were 1,407,044 were trips taken on Triangle Region bus services, about 65% of pre-COVID-19 ridership. This level slightly exceeds national trends.

The extent to which ridership has declined and then returned differs among the service operators in the Triangle Region. The following pages describe the differences in bus ridership impacts among the six fixed route service operators in the Triangle Region.





Bus Ridership Impacts of COVID-19 among Triangle Region Operators

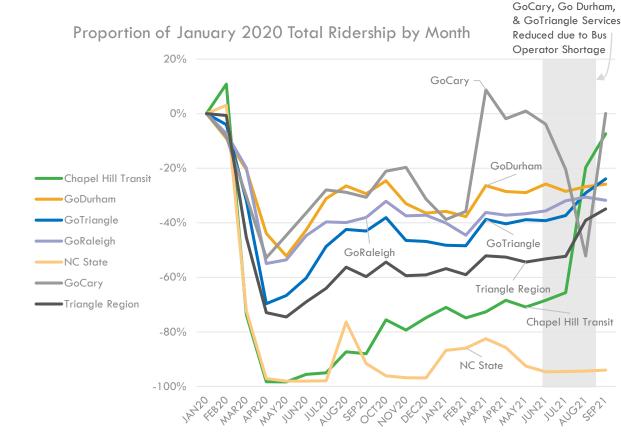
At the beginning of the pandemic, the regional impact of COVID-19 on bus ridership varied widely among agencies based on the markets that each agency serves. Recently, ridership gains among most agencies have progressed at a similar pace.

Robust ridership returns on GoRaleigh, GoDurham, GoCary, and GoTriangle services.

Ridership on GoRaleigh, GoDurham, GoCary, and GoTriangle services declined less during the initial COVID-19 stay-at-home period than both the region and the nation overall. They have also experienced a sustained return in ridership during most of 2021 that has exceeded the experience of most transit agencies in the US. Supported by an increase in service hours and streamlining of some routes, GoCary's ridership returns have exceeded January 2020 ridership during some months, except for during July and August 2021 when service was reduced due to a shortage of bus operators. GoTriangle and GoDurham service was also reduced due to operator shortages during Summer 2021. These four operators—and especially GoRaleigh and GoDurham—serve a larger share of transit reliant passengers than most agencies in the US. By maintaining most service levels and temporarily making fares free, they have continued to serve their core riders during the pandemic.

Slower ridership returns on university-focused services.

At the beginning of the pandemic, most universities ceased in-person instruction and students returned home. As a result, **transit services designed for use by college students saw a substantial and sustained ridership decline during the pandemic**. Ridership on Chapel Hill Transit and NC State Wolfline services declined to 2-3% of January 2020 levels in April and May 2020. Since the beginning of the 2021 school year, however, ridership on Chapel Hill services has nearly fully recovered, to 93% of pre-COVID-19 ridership. Ridership on NC State services remains low, since as of September 2021 NC State is operating only one-third of their January 2020 level of revenue miles of service.



Proportion of January 2020 Ridership		
Agency	May 2020	September 2021
GoDurham	48%	74%
GoTriangle	33%	76%
GoRaleigh	46%	68%
GoCary	55%	100%

Proportion of January 2020 Ridership			
Agency	May 2020	September 2021	
Chapel Hill Transit	2%	93%	
NC State	2%	6%	

urces:

National Transit Database, GoCary

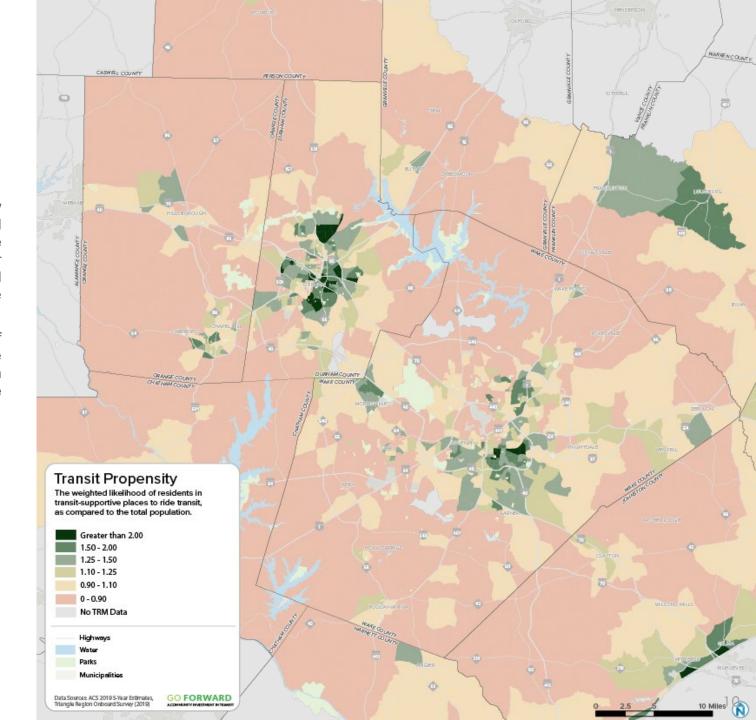
Recommendations to Better Serve the Post-COVID-19 Transit Market

As transit agencies work to restructure service to better serve the new normal, prioritizing service that best serves transit-reliant populations will help to grow ridership. Serving transit-reliant populations will require providing frequent service during midday periods and peak periods—rather than during peak periods alone—because transit-reliant residents and "essential workers" are more likely to work service jobs outside of the traditional 9 AM to 5 PM work period and during weekends.

As has been discussed with the market analysis and in the discussion of COVID-19 impacts nationally, transit critical populations are low-wage workers, Black and Hispanic populations, young people, and residents with no or limited vehicle access. In the Triangle Region, these populations are concentrated in the following areas:

- Southern Raleigh, most of Durham, and southwestern Chapel Hill, as well as some other smaller outlying areas.
- Much of Durham is more than 1.5 times as likely to ride transit as the general population of the region when considering socioeconomic factors.

Transit can best serve the post-COVID-19 travel market by providing service from early morning through evening hours 7 days a week between neighborhoods with higher transit propensity and the region's service and retail jobs. Service and retail jobs are located throughout the region, but they are concentrated in Raleigh, the northern part of Durham, and along many major highways.



3 – Strategies for Addressing Bus Operator Shortages

Bus Operator Shortages during the COVID-19 Recovery Period

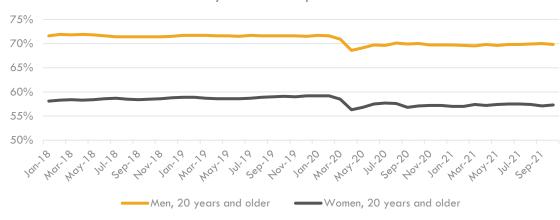
As of September 2021, the number of employed residents in the Triangle region has fully recovered, and the unemployment rate has declined to 3.1%. However, this economic recovery has been uneven across industries, and the region continues to face a shortage in bus operators that is affecting service operations among the Triangle Region's transit service operators. For example, during the Summer of 2021, GoCary, GoDurham, and GoTriangle had to significantly reduce service frequencies due to a lack of bus operators, and Chapel Hill Transit reduced service in October 2021. These service reductions are likely hobbling ridership recovery efforts (see page 9).

The lack of supply in qualified bus operators – people available for work with a certified Commercial Drivers License (CDL) – is affecting the transit industry as well as schools, ports, and delivery companies—all of whom rely on qualified drivers to operate their vehicles. The labor shortage affecting these industries, as well as similar shortages in hospitality and service jobs, is theorized to be caused by a few factors, including **record household savings from the pandemic and a lack of available childcare that is keeping the labor force participation rate low**.

In the Raleigh metropolitan statistical area, the ratio of employment to population—the most common measure of labor force participation—was 61.6% in October 2021, well below the pre-COVID-19 regional level of 63.4%, and the differences between men and women became greater. Among men, the October 2021 ratio was 69.8% and among women it was 57.3% This means that today, there are fewer people and especially fewer women available to fill positions than before the pandemic. However, the overall ratio exceeds the national ratio of 58.8% in October 2021.

To what extent has the shortage of bus operators affected transit agency operations across the country, and what are the strategies available to Triangle region transit agencies to lure and retain operators, as well as expand the pipeline of operators? To answer these questions, we conducted a national peer study of five transit agencies, and interviewed transit service managers and planners about their experience with the ongoing shortage of bus operators and solutions they are using to address it. We spoke with representatives of five agencies.





Source: Bureau of Labor Statistics

The agencies and staff we interviewed for the peer study are as follows. These agencies were selected because they serve similarly sized metro areas and, in some cases, are one of several transit agencies operating in their region:

- Charleston Area Regional Transportation Agency (CARTA in Charleston, SC): Jon Dodson, Senior Transit Planner
- Trinity Metro (Fort Worth, TX): Ronald Newman, Operations Manager
- StarTran (Lincoln, NE): Carla Cosier, Assistant Transit Manager
- StarMetro (Tallahassee, FL): Allie Merzer Fleming, Manager, Special Transit Projects
 & Communications
- Suburban Mobility Authority for Regional Transportation (SMART in Southeast Michigan): Daniel Whitehouse, Manager of Connector Services

Sources

Transportation for America: https://t4america.org/2020/09/08/how-transit-agencies-are-keeping-workers-and-riders-safe/ New York Times: https://www.nytimes.com/2021/10/19/business/economy/us-economy.html

Most Peer Agencies are Struggling with Bus Operator Shortages and have Altered their Recruitment Approach

All agencies we interviewed reported that COVID-era bus operator shortages exacerbated shortages that they faced prior to the pandemic, however the degree to which the shortages are affecting service vary widely based on how some service contracts are written and the local economy. For example, at CARTA, where transit service is purchased from Transdev, the service contract has built-in severe financial penalties for missed trips. To avoid paying this fee, Transdev has flown in bus operators from around the country in order to operate service and nearly all fixed-route service has operated as scheduled.

"Transdev has only missed a few trips per month, but they have had to fly in bus operators from elsewhere around the country in order to do so." - CARTA

Bus operator shortages have been more prolonged at the other agencies who directly operate their service—Trinity Metro, StarTran, StarMetro, and SMART are experiencing significant shortages in bus operators, from a low of 18 operators short at StarTran to a high of 100 operators short at SMART.

"We did struggle to remain fully staffed prior to the pandemic and ran an average of five operators short. Since the pandemic that average has increased to roughly 12-13 operators short with our highest shortage at 18." – StarTran

Agencies cite three main obstacles around hiring additional operators:

- 1. A lack of applicants to job postings
- 2. Widespread safety concerns among potential applicants about interacting with the public for prolonged periods
- 3. Scheduling obstacles among potential applicants with school-age children

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The starting pay for bus operator jobs has made it a common challenge among agencies to attract new staff. But seniority does pay, including overtime, and the RTA in Dayton, Ohio has begun directly advertising this unique benefit of transit jobs.

"Employees for industries where schedules aren't in line with school hours are hard to get...[and] people aren't comfortable with a lot of people for a long time, due to lots of exposure. Even if you are masked it feels risky." – SMART

How have agencies worked to enlarge the pool of applicants and assuage applicants' concerns related to safety and childcare?

- Most agencies have raised their wages as regional wages have made transit jobs less competitive. CARTA and StarTran (as city employees) have raised their wages by several dollars. SMART offered an additional \$7.50/hour in hazard pay to employees.
- Most agencies altered their recruitment and advertising messaging to underline expanded wages and the typically superior benefits of transit jobs (like stability, pensions, healthcare, and the additional pay that comes with seniority).

New Policies, Programs, and Physical Investments are Being Used to Improve Operator Retention

To stem the loss of bus operators to competing industries like school districts, trucking companies, and ports, peer agencies we interviewed have implemented a range of new policies, programs, and physical investments. These strategies involve wage increases, safety-related improvements, more nimble scheduling and culture shifts, CDL training and renewal benefits, and easier-to-operate routes.

Wage Increases

As, previously discussed, most agencies have raised their wages for existing staff as
regional wages have made transit jobs less competitive. SMART is exploring offering
a signing bonus and/or attendance bonus to operators and has offered hazard pay
to operators during the entirety of the pandemic.

Safety-related Improvements

- All agencies began and have continued to deep clean buses nightly, installed social distancing markers, built physical barriers between drivers and fare payment machines to reduce the spread of aerosols, and have worked to keep a steady supply of hand sanitizer and masks on board to distribute to passengers should they need it. SMART published a "Safety Playbook" outlining for the public how buses are deep-cleaned using state-of-the-art technologies.
- Some agencies introduced free fares and asked customers to use rear doors for boarding and alighting. StarTran continues to operate fare-free service and encourages passengers to board through the rear doors.

Scheduling and Culture Changes

 In response, some peers implemented new and more nimble scheduling policies for their operators. StarTran and SMART altered their scheduling practices to expand the types of excused absences, as well as allow some operators to work every other week to reduce exposure and to enable operators to remain home with school-age children.

Training and CDL Renewal Benefits

- Pre-pandemic, all agencies provided in-house, paid training for operators to obtain their CDL licenses. During COVID-19, StarTran has begun paying for CDL renewals.
- StarMetro has launched a Career Progression Program to assist in retention and recruitment. This program works with operators to ensure they remain on the right track to receive regular wage increases.

Service Changes

• Trinity Metro discontinued many of its coverage-focused circulator and shuttle routes that had very low ridership during the pandemic and were difficult to operate due to complex service patterns, on-time performance issues, and little layover time. A shift in focus to an all-day frequent network required streamlining many routes, but the new routes are "easier" on the operators, improving retention. These service changes allowed for more "straight-8" (rather than split) schedules, which are more popular among operators.

"[With our new service changes,] we made things less complicated, easier to read and follow the manifests and route guides, easier to stay on-time, and more end-of-line layover time. And the simplified routes and schedules enabled us to put together a more appealing roster with more consecutive days off, fewer weekend splits, etc....The operators love it and don't want us to revert anything. Hopefully word will spread that it's not so hard to drive a bus anymore." – Trinity Metro











Agencies Prioritized Strengthening their All-Day Frequent Network when Operator Shortages Require Service Reductions

At the beginning of the pandemic, all five of the agencies we interviewed reduced service levels significantly in response to the drastically reduced demand for service caused by stay-at-home orders. Most agencies we interviewed switched to weekend schedules during Summer 2020. Since then, most agencies have returned to pre-COVID-19 service levels but have had to reduce some services temporarily due to operator shortages. Trinity Metro completely redesigned their network and implemented a major service change that emphasizes a core, high-frequency network that is focused on ridership rather than coverage.

"We did eliminate some low ridership routes and upgraded service to others. The added frequency to routes with this major service change has already shown an increase in ridership...This pandemic has actually strengthened our organization to be more proactive and keeps everyone's eye sharper to the forces affecting our service that we deliver to our customers." – Trinity Metro

When operator shortages required that service be cut temporarily, agencies unanimously cut their lowest ridership and least productive services. For example, StarTran reduced the frequency of their lowest ridership routes to hourly from half-hourly in response to the large amount of overtime that operators were being asked to work. Similarly, SMART has reduced service on their low-ridership local service but maintained service on their more frequent FAST service.

"There were major concerns about [our operators] being overworked and we lost several drivers who could simply not handle the work load. Because of this...we reduced the frequency of 5 routes on weekdays to run service every hour as opposed to every half hour. These routes were chosen based on overall ridership, and in doing this we were able to eliminate 8 runs...We are continuing to run this reduced serviced as we watch our staffing levels and work to bring them back up to an obtainable level." — StarTran

Similarly, CARTA has discontinued service on their low-ridership hospitality-oriented routes as lower tourist activity has reduced demand for this kind of trip. CARTA has increased frequencies on a couple of their routes that serve essential destinations to ensure that their transit-reliant population maintains access during the pandemic.

And facing operator shortages, **StarMetro asked supervisory staff to "pinch-hit" and operate service temporarily.**

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Trinity Metro rolled out their complete network redesign in response to operator shortage and altered regional travel patterns. The network features an expanded frequent bus network (with 7 frequent routes increased from 4 pre-COVID-19) and a reduced emphasis on coverage services.

Long-Term Strategies for Expanding the Hiring Pipeline of Bus Operators

Our interviews with peer agencies revealed additional longer-term strategies for expanding the pipeline of bus operators. Responses from all agencies emphasized that the pandemic only exacerbated a pre-existing issue of bus operator shortage. Peers pointed to a couple of strategies that may help to expand the pipeline of bus operators:

Community College Partnerships

Some agencies across the country have begun partnering with local community colleges to recruit and train local residents in bus operation. For example, in 2019 the RTA in Cleveland, OH developed the Temporary Commercial Drivers' License Training Program, in partnership with Tri-C, to address the challenge of creating a larger pipeline of operator applicants (bus and paratransit) to fill job openings and remove barriers that unnecessarily discourage interested and qualified applicants. The four-day, 40-hour training allowed RTA candidates to be trained and tested in order to obtain their temporary or permanent CDL license prior to beginning RTA operator training. Class groups were scheduled every two weeks based on hiring of RTA new student operator trainees. RTA hired up to eight new student operators per class group. Each class session was held at Tri-C's Transportation Innovation Center in Euclid, Ohio.

A similar partnership exists in Rhode Island, where the Rhode Island Public Transit Authority offers its own bus maintenance and service bays to community college students for on-site training, in order to expand the hiring pipeline for bus maintainers.

In-House Childcare

Due to the high and growing cost of childcare, and widespread childcare center closures across the US due to COVID-19, the possibility of offering in-house complimentary or reduced-cost childcare to children of bus operators was a strategy that Trinity Metro has explored to attract and retain staff. Not only is childcare a powerful fringe benefit that can retain existing staff, but a lack of childcare is an identified issue that has resulted in the loss of some staff or has forced some staff, particularly women



A future RTA bus operator training on a driving simulator at Tri-C's Transportation Innovation Center in Euclid, Ohio. RTA and Tri-C partnered in 2019 to provide temporary Commercial Drivers' License (CDL) training to RTA bus operator applicants.(Source: Cuyahoga Community College)

to reduce their schedules to part-time. Childcare is an expensive benefit to provide due to the staffing and facility requirements, so this strategy would likely need a new and sustained funding source.

Capital Metro in Austin, TX offers its employees discounted childcare enrollment at its inhouse Child Care and Learning Center. The Child Care and Learning Center is available to Capital Metro employees, contractor employees and community children between the ages of 6 months to 6 years. The rates for employees and contractors are discounted by income. The center is operated by Bright Horizons Family Solutions.

A related solution has been put into place by Pierce Transit in Washington, who during COVID-19 took advantage of the federal Families First Coronavirus Response Act to provide employees with an additional 80 hours of paid leave for childcare.

Sources

Capital Metro: https://www.capmetro.org/jobs/employee-benefits
Transportation for America: https://t4america.org/2020/09/08/how-transit-agencies-are-keeping-workers-and-riders-safe/