

## **CRAFT SURVEY PROCEDURE**

*This document shall replace all past documents and establish the procedures for transfers/ transitions for all CTA craft employees.*

*As journeyman vacancies to be filled occur at a Shop location, it will first be offered to FTP CTA employees within the same shop location. Upon completion of surveys, it next will be offered to FTP CTA employees at the other Shop locations. Finally the open FTP positions will lastly be offered to eligible FTTC employees at any of the 3 Shop locations.*

### **PROPOSED PROCEDURES**

**I** *FTP Journeyman Vacancies to be filled shall first be offered to FTP CTA employees within the same shop by the survey process as follows:*

- 1. If no current survey is open, (Surveys remain active for 1 year from date initiated) prepare a new survey by FTP ESD seniority. Surveys remain active for 1 year from date initiated. Surveys will remain open for 14 days.*
- 2. Survey will be routed to employees within the job classification to sign survey indicating if interested or not. Once the employee declines the transfer on the survey, there will be no changes.*
- 3. The most senior employee (based on SHOP seniority) that surveyed interested will be considered.*
- 4. Conduct a Level I record review.*
- 5. If work record acceptable, employee will be transferred to the vacant position. Employees that transfer are allowed a 30 day window to reverse the transfer. Employee will remain in that area for one year before being eligible to sign another survey.*
- 6. If employee failed record review, note survey and continue to the next interested employee until an acceptable employee is found.\**
- 7. Start survey procedure again to backfill the position of the employee who transferred. Continue process until such time as no one is interested in transferring to that area.*

**II** *When a Journeyman vacancy becomes available to move between Shops, the following procedure should be followed:*

1. When there are no interested FTP employees to transfer within the shop location of the vacancy, a request is forwarded to the other shop locations requesting that they survey their FTP employee's for the vacant FTP position by their FTP ESD seniority.
2. The most senior employee (based on FTP ESD) that surveyed interested will be considered.
3. The incoming shop conducts a Level I record review.
4. If work record is acceptable, arrangements to be made to administer practical test. If review of the test indicates a passing grade, employee's shop location is notified to arrange transfer date. Employee will remain in that position for one year before being able to transfer out on a survey to another Shop location again.
5. If employee failed the record review, survey to be noted and continue to the next interested employee until an acceptable employee is found.\*

**\*If another vacancy opens up during an open survey, previously ineligible employees' records will be re-assessed in seniority order.**

### **III FTP Journeyman Vacancy to be filled by surveying FTTC employees.**

1. If no interested, eligible, qualified candidates exist in either (I or II Procedure) then FTTC employees at all locations within the same classification will be surveyed for the vacant FTP position by entered service date (earliest original date of hire) order.
2. The most senior FTTC employee (system wide) that signed interested will be considered.
3. Conduct a Level I record review.
4. If work record acceptable, and employee is from another work location, arrangements are to be made to administer practical test. If review of the test indicates a passing grade, contact HR to make transition arrangements. (Employees at the home location need not be tested.) FTTC employees who transfer to become FTP are immediately eligible to transfer to other system wide FTP vacancy without a 12 month restriction, so long as the vacancy has already been subjected to Steps I and II of this procedure. All subsequent transfers are subject to the 12 month waiting period before gaining further eligibility.

## **WORK RECORD REVIEW CRITERIA**

### **LEVEL I**

*The following criteria shall be used in determining Transfer / Transition eligibility;*

1. *No suspensions*
2. *No corrective case interviews*
3. *No safety violations (24 months)*
4. *No chargeable complaints*
5. *No chargeable accidents*
6. *No chargeable IOD's*
7. *No more than two (2) sick book entries*
8. *No more than two (2) misses/tardies/unexcused absence*
9. *No more than two (2) non-safety-related violations*

### **LEVEL II**

1. *No suspensions*
2. *No corrective case interviews*
3. *No chargeable complaints*
4. *No chargeable accidents*
5. *No chargeable IOD's*
6. *No more than 2 sick book entries*
7. *No misses/unexcused absence*
8. *No safety violations (24 months)*
9. *No more than 1 tardy/early dismissal*

### **LEVEL III**

1. No suspensions
2. No corrective case interviews
3. No chargeable complaints
4. No chargeable accidents
5. No chargeable IOD's
6. No more than 1 sick book entry
7. No misses/tardies/unexcused absence
8. No safety violations (24 months)

*The criteria guideline reflects a rolling 12 month period from the date of the evaluation with the exception of Safety Rule Violations, which is 24 months. Please note this guideline affects only transfer within the same job classification and does not alter guideline for promotion or training opportunities.*

X

Katharine Lunde  
General Manager, CTA Labor Relations

X

Steve Jones  
Machinists, District 8

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Re: Training Fund and Machinists Benefit Program

Gentlemen:

This letter will confirm certain agreements and understandings reached by the parties during the recent collective bargaining negotiations with respect to the following matters listed below.

1. Machinists Local 701 Training Fund: The Union proposed that the Authority agree to participate in the Automobile Mechanics' Union Local No. 701 Apprenticeship Training and Skill Development Fund as a contributing employer. The contribution level would be \$2.00 per Union employee working under the terms of the Agreement. Although the parties engaged in discussions concerning the Authority's participation in this Fund, they determined to defer discussion of this issue to the Union-Management Committee pursuant to Article I Section 1.10 of the Agreement, which discussion will be had within six (6) months of the ratification of the terms of the 2012-2016 Agreement by the Union and the CTA Board. This discussion is intended to provide the parties with the ability to investigate further how the Fund could provide necessary training for Union members who work for the CTA and what benefit the Authority could derive from participation in the Fund. In the event that as a result of these discussions the parties mutually agree that the Authority will participate in the Fund, the program will be included as a part of that Agreement.

2. Machinists Custom Choices Worksite Benefits Program: During the negotiations, the Union raised the possibility of the Authority adopting the provisions of the Machinists Custom Choices Worksite Benefits program of supplemental insurance, to be administered by the Employee Benefits Systems, Inc., and financed through the voluntary payroll deductions by the members of the Union who may wish to participate in that program. The parties agreed to defer discussion of this issue to the Union-Management Committee pursuant to Article I Section 1.10 of the Agreement, which discussion will be had within six (6) months of the ratification of the terms of the 2012-2016 Agreement by the Union and the CTA Board. In the event that as a result of these discussions the parties mutually agree to adopt this program of benefits, the program will be included for employees of the Union as a part of that Agreement.

If the above accurately reflects the agreement between the Authority and the Union, please so indicate by signing in the appropriate space below.

Very truly yours.

CHICAGO TRANSIT AUTHORITY

By: \_\_\_\_\_

Accepted and agreed on behalf of the Union:

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