

**CITY COUNCIL OF MONTEREY PARK
AND THE CITY COUNCIL ACTING ON BEHALF OF THE SUCCESSOR AGENCY OF THE FORMER
REDEVELOPMENT AGENCY
AGENDA**

REGULAR MEETING

**Monterey Park City Hall Council Chambers
320 W. Newmark Avenue, Monterey Park, CA 91754**

**Wednesday
May 15, 2019
7:00 p.m.**

MISSION STATEMENT

**The mission of the City of Monterey Park is to provide excellent services
to enhance the quality of life for our entire community.**

Documents related to an Agenda item are available to the public in the City Clerk's Office located at 320 West Newmark Avenue, Monterey Park, CA 91754, during normal business hours and the City's website at www.montereypark.ca.gov.

PUBLIC COMMENTS ON AGENDA ITEMS

You may speak up to 5 minutes on Agenda item. You may combine up to 2 minutes of time with another person's speaking. No person may speak more than a total of 10 minutes. The Mayor and City Council may change the amount of time allowed for speakers.

Per the Americans with Disabilities Act, if you need special assistance to participate in this meeting please call City Hall at (626) 307-1359 for reasonable accommodation at least 24 hours before a meeting. Council Chambers are wheelchair accessible.

This Agenda includes items considered by the City Council acting on behalf of the Successor Agency of the former Monterey Park Redevelopment Agency which dissolved February 1, 2012. Successor Agency matters will include the notation of "SA" next to the Agenda Item Number.

CALL TO ORDER **Mayor**

FLAG SALUTE **The Monterey Park Police Explorers**

ROLL CALL **Peter Chan, Mitchell Ing, Stephen Lam, Hans Liang, Teresa Real Sebastian**

AGENDA ADDITIONS, DELETIONS, CHANGES AND ADOPTIONS

PUBLIC COMMUNICATIONS. While all comments are welcome, the Brown Act does not allow the City Council to take action on any item not on the agenda. The Council may briefly respond to comments after Public Communications is closed. Persons may, in addition to any other matter within the City Council's subject-matter jurisdiction, comment on Agenda Items at this time. If you provide public comment on a specific Agenda item at this time, however, you cannot later provide comments at the time the Agenda Item is considered.

ORAL AND WRITTEN COMMUNICATIONS

[1.] PRESENTATION

1-A. MONTEREY PARK POLICE EXPLORER PROGRAM PRESENTATION

1-B. CITY MANAGER UPDATES

[2.] OLD BUSINESS – None.

[3.] CONSENT CALENDAR ITEMS NOS. 3A-3E

3-A. SUCCESSOR AGENCY MONTHLY INVESTMENT REPORT – APRIL 2019

It is recommended that the City Council (acting on behalf of the Successor Agency):

- (1) Receive and file the Monthly Investment Report; and
- (2) Take such additional, related, action that may be desirable.

3-B. WARRANT REGISTER FOR THE CITY OF MONTEREY PARK OF MAY 15, 2019

It is recommended that the City Council:

- (1) Approve payment of warrants and adopt a Resolution allowing certain claims and demands per Warrant Register dated May 15, 2019 totaling \$1,842,325.31 specifying the funds out of which the same are to be paid; and
- (2) Take such additional, related, action that may be desirable.

3-C. MONTHLY INVESTMENT REPORT – APRIL 2019

It is recommended that the City Council:

- (1) Receive and file the monthly investment report; and
- (2) Take such additional, related, action that may be desirable.

3-D. A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF MONTEREY PARK, CALIFORNIA DECLARING MAY 12 – 18, 2019 AS “POLICE WEEK” AND WEDNESDAY, MAY 15, 2019 AS “PEACE OFFICERS MEMORIAL DAY.”

It is recommended that the City Council:

- (1) Adopt Resolution no. _____ declaring May 12 – 18, 2019 as “Police Week” in Monterey Park and Wednesday, May 15, 2019 as “Peace Officers Memorial Day”; and
- (2) Take such additional, related, action that may be desirable.

3-E. CONTINUANCE FOR DECISION REGARDING CONSTRUCTION OF A 54-UNIT SENIOR CITIZEN HOUSING CONDOMINIUM PROJECT – 130-206 SOUTH CHANDLER AVENUE

It is recommended that the City Council consider:

- (1) Continuing a final decision regarding this application until the meeting of June 5, 2019; and
- (2) Taking such additional, related, action that may be desirable.

[4.] PUBLIC HEARING – None.

[5.] NEW BUSINESS

5-A. RESIDENTIAL REHABILITATION PROGRAM LOAN REQUEST (SEVERO AND MARIA JIMENEZ / 1119 KNOLL DRIVE, MONTEREY PARK, CA 91754)

It is recommended that the City Council:

- (1) Approving a Residential Rehabilitation Program Loan of not to exceed \$140,000; and
- (2) Authorizing the City Manager to execute all necessary loan documents; and
- (3) Take such additional, related, action that may be desirable.

5-B. AWARD OF SPIRIT BUS CONTRACT

It is recommended that the City Council consider:

- (1) Authorizing the City Manager to execute a contract, in a form approved by the City Attorney, with Transportation Concepts for operating the City's Spirit Bus transportation program; and
- (2) Taking such additional, related, action that may be desirable.

CEQA (CALIFORNIA ENVIRONMENTAL QUALITY ACT):

Taking the recommended action would not result in a potential for resulting in a direct or reasonably indirect physical change in the environment and, accordingly, does not qualify as a "project" under the California Environmental Quality Act (Cal. Pub. Res. Code §§ 21000, *et seq.*; "CEQA") or CEQA regulations (Cal. Code Regs. tit. 14, §§ 15000, *et seq.*; see Cal. Code Regs. tit. 14, §§ 15061(b)(3), 15378). Even if the award of contract were to qualify as a project, it would be categorically exempt as a Class 1 or Class 5 project since, at best, it would constitute a minor alteration of existing public structures involving no expansion of use; or a minor alteration in land use limitations (see Cal. Code Regs. tit. 14, §§ 15301, 15305).

5-C. APPROVAL OF MONTEREY PARK MOBILITY PROGRAM PLAN

It is recommended that the City Council:

- (1) Provide direction to staff regarding the City's Transit Programs;
- (2) Approve Monterey Park Mobility Program Plan; and
- (3) Take such additional, related, action that may be desirable.

[6.] COUNCIL COMMUNICATIONS AND MAYOR/COUNCIL AND AGENCY MATTERS

6-A. A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF MONTEREY PARK, CALIFORNIA DECLARING THE MONTH OF MAY AS ASIAN AMERICAN AND PACIFIC ISLANDER HERITAGE MONTH (REQUESTED BY MAYOR CHAN)

[7.] CLOSED SESSION (IF REQUIRED; CITY ATTORNEY TO ANNOUNCE)

ADJOURN



City Council Staff Report

DATE: May 15, 2019

AGENDA ITEM NO: Consent Calendar
Agenda Item 3-A.

TO: The Honorable Mayor and City Council
FROM: Annie Yaung, CPFO, Director of Management Services
SUBJECT: Successor Agency Monthly Investment Report – April 2019

RECOMMENDATION: It is recommended that the City Council:

- (1) Receive and file the Monthly Investment Report; and
- (2) Take such additional, related, action that may be desirable.

EXECUTIVE SUMMARY:

As of April 30, 2019 invested funds for the Successor Agency of the City of Monterey Park is as follows:

• Successor Agency (SA) Checking	114,006.78
• Successor Agency (SA) RORF	<u>69,190.00</u>
Total	<u>\$ 183,196.78</u>

BACKGROUND:

In accordance with the City's Investment Policy, a monthly investment report is presented to the City Council showing the types of investments, dates of maturities, amounts of deposits, rates of interest, and the current market values for securities with maturity more than 12 months.

Respectfully submitted and prepared by:

Approved by:



Annie Yaung, CPFO
Director of Management Services



Ron Bow
City Manager



City Council Staff Report

DATE: May 15, 2019

AGENDA ITEM NO: Consent Calendar
Agenda Item 3-B.

TO: The Honorable Mayor and City Council
FROM: Annie Yaung, CPFO, Director of Management Services
SUBJECT: Warrant Register for the City of Monterey Park of
May 15, 2019

RECOMMENDATION:

It is recommended that the City Council:

- (1) Approve payment of warrants and adopt a Resolution allowing certain claims and demands per Warrant Register dated **May 15, 2019 totaling \$1,842,325.31** specifying the funds out of which the same are to be paid; and
- (2) Take such additional, related, action that may be desirable.

EXECUTIVE SUMMARY:

Disbursements will be made from the funds referenced in the attached Resolution in Warrants numbered **323657-323860** and ACH numbered **000473-000522**.

BACKGROUND:

The claims and demands on the attached warrant register have been duly audited. I certify that the said claims and demands are accurate, are proper charges against the City of Monterey Park. I also certify that there are monies available for the payments thereof.

FISCAL IMPACT:

Disbursements from all funds total **\$1,842,325.31**.

Respectfully submitted:

Approved By:



Annie Yaung, CPFO
Director of Management Services

Ron Bow
City Manager

Attachments 1: Resolution
Attachments 2: Warrant Register

ATTACHMENT 1

Resolution

RESOLUTION NO.
A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF
MONTEREY PARK, CALIFORNIA ALLOWING CERTAIN CLAIMS AND DEMANDS
PER WARRANT REGISTER DATED
15TH OF MAY 2019
TOTALING \$1,842,325.31 AND SPECIFYING THE FUNDS OUT
OF WHICH THE SAME ARE TO BE PAID

THE CITY COUNCIL OF THE CITY OF MONTEREY PARK DOES RESOLVE:

SECTION 1. That the following claims and demands have been audited and that the same are hereby allowed from various funds in the following amounts:

General Fund	\$ 233,817.71
Retirement Fund	5,450.00
State Gas Tax Fund	8,683.64
Sewer Fund	939.42
Refuse Fund	459,577.02
City Shop Fund	36,984.82
Technology Internal Service Fund	30,542.77
Payroll Clearing Account	576.00
Special Deposits Fund	33,166.86
Water Fund	36,395.16
Water Treatment WQA-EPA Fund	17,566.86
Water Treatment City Fund	31,106.00
OPA Proposition A	59,719.78
Measure R Fund	27,474.76
POST	3,088.00
EI Civic Education Grant	3,935.35
Home Housing Program	22,910.00
Recreation Fund	25,370.28
Cal Library Literacy Svc Grant	360.70
Air Quality Improvement Fund	5,931.00
CDBG Fund	2,925.00
Maintenance District 93-1	39.95
Prop A - Per Parcel Grant	369.44
Used Oil Recycling Block Grant	865.00
Beverage Container Recycling	850.00
ELAC Instructional Serv Prog	2,753.02
General Plan Review Trust	93,867.64
Asset Forfeiture - Treasury	14,870.30
MTA Clean Fuel Bus Grant	513,394.00
MSRC Natural Gas Bus Grant	87,594.00
Ground Emergency Medical Transport	62,982.06
Homeland Security Grant - 2016	18,218.77
 TOTAL	 <u>\$ 1,842,325.31</u>

PASSED, APPROVED AND ADOPTED THE 15TH OF MAY 2019.

Peter Chan, Mayor
City of Monterey Park, California

ATTEST

Vincent D. Chang, City Clerk
City of Monterey Park, California

RESOLUTION NO.
Page 2

STATE OF CALIFORNIA)
COUNTY OF LOS ANGELES) SS.
CITY COUNCIL OF THE)
CITY OF MONTEREY PARK)

I hereby certify that the foregoing Resolution was adopted by the City Council of the City of Monterey Park at a regular meeting held on the 15th of May 2019 by the following vote of the Council:

AYES:	COUNCIL MEMBERS:
NOES:	COUNCIL MEMBERS:
ABSTAINED:	COUNCIL MEMBERS:
ABSENT:	COUNCIL MEMBERS:

Vincent D. Chang, City Clerk
City of Monterey Park, California

ATTACHMENT 2

Warrant Register

**CITY OF MONTEREY PARK
FINAL WARRANT REGISTER
COUNCIL MEETING DATE 05/15/2019**

PREPAID WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
ROBERTO A AGUIRRE	0075-450-0075-09083	69.08	3 CAUSES 1 WALK BIBS (TRUST)		323676	
	0010-801-6508-31990	371.88	PEDESTAL SIGN HOLDERS		323676	
	0043-801-6508-39860	1,231.69	TOT SWING REPLACEMENTS		323676	1,672.65
ALLSTAR FIRE EQUIPMENT INC.	0010-801-3210-22300	1,498.25	LEATHER SHIELDS FOR HELMETS		323657	1,498.25
ANTHEM BLUE CROSS	0010-801-5102-12330	3,688.80	05/19 MEDICAL INSURANCE		323677	3,688.80
AT & T	0010-801-3112-32050	88.91	PHONE SERVICE		323678	
	0022-801-4206-32050	630.21	PHONE SERVICE		323678	
	0092-801-4222-32050	117.40	PHONE SERVICE		323678	836.52
	0010-801-3201-32050	49.23	PHONE SERVICE		323658	49.23
TYLER AYALA	0010-801-3210-39400	100.00	USAR TECHNICAL SEARCH		323679	100.00
RON BOW	0010-801-1201-39400	248.50	ICSC RECON		323680	248.50
CALIFORNIA ASSOCIATION OF	0065-464	576.00	LTD FIREFIGHTERS		323681	576.00
PETER CHAN	0010-801-1101-39400	248.50	ICSC RECON		323682	248.50
CHARTER COMMUNICATIONS	0010-801-1404-32050	72.56	INTERNET/CABLE SERVICE		323659	
	0010-801-3112-32050	69.92	INTERNET/CABLE SERVICE		323659	
	0043-801-1404-32050	53.47	INTERNET/CABLE SERVICE		323659	
	0092-801-1404-32050	64.92	INTERNET/CABLE SERVICE		323659	260.87
	0092-801-4222-32050	137.27	INTERNET/CABLE SERVICE		323673	

**CITY OF MONTEREY PARK
FINAL WARRANT REGISTER
COUNCIL MEETING DATE 05/15/2019**

PREPAID WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
						137.27
CHARTER COMMUNICATIONS	0010-801-3201-32050	619.94	INTERNET/CABLE SERVICE		323683	619.94
RAYMOND COTA	0362-801-3103-22800	100.00	POLICE TRAINING		323684	100.00
DEPARTMENT OF HEALTH CARE SERVICES	0465-701-0465-05400	15,365.07	EMERGENCY TRANSPORT SVC GEMT		323674	15,365.07
DFM ASSOCIATES	0010-801-1301-39350	116.07	2019 ELECTIONS CODE		323685	116.07
DIVERSIFIED RISK INSURANCE BROKERS	0075-450-0075-08350	212.66	SPECIAL EVENT INSURANCE(TRUST)		323686	1,109.54
	0075-450-0075-08620	896.88	SPECIAL EVENT INSURANCE(TRUST)		323686	
EMS PERSONNEL FUND	0010-801-3220-41100	200.00	PARAMEDIC LICENSE		323660	200.00
EPROMOS PROMOTIONAL PRODUCTS, INC	0010-801-1704-34200	949.94	CITY LOGO USB DRIVE		323661	949.94
GALLS, LLC	0467-801-3210-54250	8,101.61	UNIFORMS-USAR PARKA	19-0368	323662	8,101.61
GARRETT KURAI	0075-450-0075-09010	100.00	CHEERY BLOSSOM PERFORMER-TRUST		323687	100.00
LOUIS GORDON	0152-801-2206-38620	13,775.00	HOME REHAB-212 E GLEASON	19-0341	323663	16,150.00
	0152-801-2206-38650	2,375.00	HOME REHAB-212 E GLEASON	19-0341	323663	
MATT HALLOCK	0349-801-3201-39400	1,655.87	FDIC INTERNATIONAL CONVENTION		323688	1,655.87
HITEN RATANJEE	0010-801-3210-22310	410.34	TRAINING UNIFORMS		323689	410.34
MATTHEW HUI	0075-450-0075-08610	150.00	PLAY DAYS PERFORMER (TRUST)		323664	

**CITY OF MONTEREY PARK
FINAL WARRANT REGISTER
COUNCIL MEETING DATE 05/15/2019**

PREPAID WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
						150.00
MITCHELL ING	0010-801-1101-39400	177.50	ICSC RECON		323690	177.50
K-9 SERVICES LLC	0362-801-3103-22800	350.00	K-9 TRAINING		323691	350.00
LANGLEY WEST	0010-701-0010-02010	105.00-	VOID CHECK		322846	
	0010-701-0010-02020	4.00-	VOID CHECK		322846	109.00-
HANS J LIANG	0010-801-1101-39400	319.50	ICSC RECON		323692	319.50
MARILYNN HARA	0010-801-1704-34200	1,535.19	ECON DEV PROMOTION ITEMS		323693	1,535.19
MAURICE K. MALONEY	0075-450-0075-08610	150.00	PLAY DAYS PERFORMER (TRUST)		323665	150.00
ALEX J. MENA	0160-801-3101-39400	18.00	POLICE TRAINING		323694	18.00
MONTEREY PARK WOMAN'S CLUB	0075-450-0075-08610	200.00	PLAY DAYS RECEPTION (TRUST)		323695	200.00
MT. SAN ANTONIO COLLEGE	0010-801-3230-39700	368.00	CPR CARDS FOR CERT CLASS		323696	
	0010-801-3230-39700	231.00-	CPR CARDS FOR CERT-CREDIT		323696	137.00
ORLANDO MURO	0075-450-0075-09010	800.00	CHERRY BLOSSOM (TRUST)		323666	800.00
JOHN NOSSE	0010-701-0010-02010	105.00	REFUND BUSINESS LICENSE		323697	
	0010-701-0010-02020	4.00	REFUND STATE FEE		323697	109.00
OFFICE SOLUTIONS BUSINESS PRODUCTS	0010-801-1403-22750	119.22	FOLDERS,BATTERY,STAPLES		323698	
	0010-801-1403-22750	255.51	PAPER,REPORT COVER,PENS		323698	

**CITY OF MONTEREY PARK
FINAL WARRANT REGISTER
COUNCIL MEETING DATE 05/15/2019**

PREPAID WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
OFFICE SOLUTIONS BUSINESS PRODUCTS	0010-801-1301-22750	15.82	PAPER		323698	390.55
PACIFIC TELEMAGEMENT SERVICES	0010-801-6502-32050	153.00	PAY PHONE SERVICE		323699	153.00
PAGEENTRY PARADES	0075-450-0075-08610	10,750.00	PARADE COORDINATION (TRUST)	19-0387	323700	13,840.00
	0075-450-0075-08610	3,090.00	PARADE COORDINATION (TRUST)	19-0387	323700	
PARTYLINE EVENTS INC.	0075-450-0075-09010	14,000.00	CHERRY BLOSSOM RENTAL (TRUST)	19-0249	323667	14,302.29
	0092-801-6508-39860	302.29	CHERRY BLOSSOM RENTAL	19-0249	323667	
	0075-450-0075-08520	2,141.34	CINCO DE MAYO RENTAL (TRUST)		323701	2,141.34
PITNEY BOWES POSTAGE BY PHONE	0010-801-1301-32200	51.35	POSTAGE		323702	14,302.29
	0010-801-1403-32200	73.60	POSTAGE		323702	
	0010-801-1406-32200	77.50	POSTAGE		323702	
	0010-801-1701-32200	10.30	POSTAGE		323702	
	0010-801-1702-32200	17.10	POSTAGE		323702	
	0010-801-1703-32200	2.50	POSTAGE		323702	
	0010-801-1801-32200	22.60	POSTAGE		323702	
	0010-801-1802-32200	19.50	POSTAGE		323702	
	0010-801-3101-32200	3.00	POSTAGE		323702	
	0010-801-3102-32200	29.60	POSTAGE		323702	
	0010-801-3104-32200	12.04	POSTAGE		323702	
	0010-801-3114-32200	117.35	POSTAGE		323702	
	0010-801-3115-32200	0.46	POSTAGE		323702	
	0010-801-3120-32200	0.50	POSTAGE		323702	
	0010-801-3201-32200	16.81	POSTAGE		323702	
	0010-801-3205-32200	18.65	POSTAGE		323702	
	0010-801-3210-32200	20.50	POSTAGE		323702	

CITY OF MONTEREY PARK
FINAL WARRANT REGISTER
COUNCIL MEETING DATE 05/15/2019

PREPAID WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
PITNEY BOWES POSTAGE BY PHONE	0010-801-3220-32200	0.85	POSTAGE		323702	
	0010-801-6001-32200	27.45	POSTAGE		323702	
	0010-801-6502-32200	21.45	POSTAGE		323702	
	0043-801-1201-32200	14.75	POSTAGE		323702	
	0043-801-4212-32200	1.50	POSTAGE		323702	
	0075-450-0075-09230	88.20	POSTAGE (TRUST)		323702	
	0092-801-4223-32200	1.00	POSTAGE		323702	648.56
DONNA RAMIREZ	0010-801-1704-33200	319.50	ICSC RECON		323703	319.50
RAQUEL RICHARDS	0010-801-1802-33100	10.79	PETTY CASH-MILEAGE		323704	
	0010-801-1801-22670	37.21	PETTY CASH-SUPPLIES		323704	
	0010-801-1801-39550	63.48	PETTY CASH-TRAINING SUPPLIESS		323704	
	0010-801-1801-22670	88.12	PETTY CASH-SUPPLIES		323704	
	0010-801-1801-39550	21.55	PETTY CASH-ORAL BOARD		323704	
	0010-801-1802-39400	89.43	PETTY CASH-REFRESHMENTS		323704	
	0010-801-1801-39550	7.99	PETTY CASH-ORAL SUPPLIES		323704	
	0010-801-1802-39400	27.17	PETTY CASH-BACKSAFE SAFETY		323704	
	0010-801-1801-39550	11.44	PETTY CASH-REFRESHMENTS		323704	
	0010-801-1802-39400	25.74	PETTY CASH-REFRESHMENTS		323704	
	0010-801-1801-39550	10.26	PETTY CASH-REFRESHMENTS		323704	393.18
EVERARDO ROMO	0136-801-3101-33250	18.00-	VOID CHECK		323072	18.00-
JEFFREY SANCHEZ	0160-801-3101-39400	18.00-	VOID CHECK		322889	18.00-
SOUTHERN CALIFORNIA LIBRARY COOPERA	0010-801-6001-39300	3,500.00	LIBRARY MEMBERSHIP	19-0379	323668	
	0010-801-6001-33200	72.38	LIBRARY MEMBERSHIP	19-0379	323668	
	0010-801-6001-33100	12.62	LIBRARY MEMBERSHIP	19-0379	323668	

**CITY OF MONTEREY PARK
FINAL WARRANT REGISTER
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PREPAID WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
						3,585.00
SPRINT COMMUNICATIONS COMPANY, LP	0010-801-3115-38400	963.38	MPLS OVER ETHERNET	19-0274	323705	963.38
STAPLES BUSINESS ADVANTAGE	0010-801-3230-39700	672.55	FIRE SERVICE DAY FLYERS		323669	672.55
STATE CONTROLLER'S OFFICE	0022-801-4202-31950	1,946.88	ANNUAL STREET REPORT		323675	1,946.88
TEAM WENDY LLC	0467-801-3210-54250	9,040.20	USAR HELMETS AND HEADLAMPS	19-0367	323670	9,258.34
	0467-801-3210-54250	858.82	USAR HELMETS, HEADLAMPS, USE TAX		323670	
	0010-431	858.82-	USAR HELMETS, HEADLAMPS-USE TAX		323670	
	0467-801-3210-54250	218.14	USAR HELMETS, HEADLAMPS FREIGHT	19-0367	323670	
VERIZON WIRELESS	0022-801-4206-32050	112.26	WIRELESS VOICE & DATA SERVICE		323671	472.74
	0010-801-4209-32050	12.23	WIRELESS VOICE & DATA SERVICE		323671	
	0010-801-4212-32050	110.36	WIRELESS VOICE & DATA SERVICE		323671	
	0092-801-4221-32050	15.85	WIRELESS VOICE & DATA SERVICE		323671	
	0092-801-4222-32050	0.38	WIRELESS VOICE & DATA SERVICE		323671	
	0092-801-4223-32050	80.40	WIRELESS VOICE & DATA SERVICE		323671	
	0010-801-6502-32050	0.19	WIRELESS VOICE & DATA SERVICE		323671	
	0010-801-6517-32050	103.06	WIRELESS VOICE & DATA SERVICE		323671	
	0010-801-1201-38400	38.01	WIRELESS VOICE & DATA SERVICE		323671	
	0010-801-1701-32050	38.82	WIRELESS VOICE & DATA SERVICE		323706	
	0010-801-1702-32050	255.06	WIRELESS VOICE & DATA SERVICE		323706	
	0010-801-1703-32050	49.30	WIRELESS VOICE & DATA SERVICE		323706	
	0010-801-1704-32050	42.80	WIRELESS VOICE & DATA SERVICE		323706	
	0010-801-1408-32050	0.19	WIRELESS VOICE & DATA SERVICE		323706	
	0010-801-1701-32050	38.01	WIRELESS VOICE & DATA SERVICE		323706	

CITY OF MONTEREY PARK
FINAL WARRANT REGISTER
COUNCIL MEETING DATE 05/15/2019

PREPAID WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
VERIZON WIRELESS	0010-801-1702-32050	7.31	WIRELESS VOICE & DATA SERVICE		323706	
	0010-801-1703-32050	38.01	WIRELESS VOICE & DATA SERVICE		323706	
	0010-801-3112-32050	136.72	WIRELESS VOICE & DATA SERVICE		323706	
	0010-801-4202-32050	111.39	WIRELESS VOICE & DATA SERVICE		323706	
	0010-801-4209-32050	148.37	WIRELESS VOICE & DATA SERVICE		323706	
	0010-801-4210-32050	4.36	WIRELESS VOICE & DATA SERVICE		323706	
	0010-801-4212-32050	94.22	WIRELESS VOICE & DATA SERVICE		323706	
	0010-801-6517-32050	12.47	WIRELESS VOICE & DATA SERVICE		323706	
	0092-801-4221-32050	25.37	WIRELESS VOICE & DATA SERVICE		323706	
	0092-801-4222-32050	0.19	WIRELESS VOICE & DATA SERVICE		323706	
						1,002.59
JULIE MARIE VILLANUEVA	0010-801-6006-22450	50.98	PETTY CASH-STORYTIME PUPPETS		323707	
	0010-801-6004-22450	81.10	PETTY CASH-ALA POSTER		323707	
	0010-801-6006-22450	98.87	PETTY CASH-PAINTING PROGRAM		323707	
						230.95
THOMAS C. WELCH	0010-801-1704-33200	319.50	ICSC RECON		323708	
						319.50
YOUR FRONT DOOR ENTRY SYSTEMS, INC.	0010-801-3210-38400	405.00	GATE SERVICE CALL	19-0148	323672	
						405.00
TOTAL FOR PREPAID WARRANTS						109,041.51
PRINTED		109,041.51				

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
A-Z BUS SALES INC	0443-850-5002-96066	215,625.94	BUS VIN#007314	17-0440	473 **	
	0443-850-5002-96066	215,625.94	BUS VIN#007294	17-0440	473 **	
	0443-850-5002-96066	51,942.12	BUS VIN#007341	17-0440	473 **	
	0443-850-5004-96066	30,200.00	BUS VIN#007341	17-0440	473 **	
	0458-850-5002-96066	87,594.00	BUS VIN#007341	17-0440	473 **	
	0109-850-5002-96066	45,889.82	BUS VIN#007341	17-0440	473 **	
						646,877.82
AEF SYSTEMS CONSULTING, INC.	0063-801-5002-99072	707.50	CONSULTING SERVICES FOR RFP	19-0342	474 **	
						707.50
AERUS ELECTROLUX	0010-801-6001-38100	189.47	VACUUM CLEANER REPAIR		323709	
	0010-801-6001-38100	68.95	VACUUM CLEANER REPAIR		323709	
						258.42
ROBERTO A AGUIRRE	0010-801-6502-31150	349.48	CPRS CONFERENCE		323710	
						349.48
ANGELINA ALFINITO	0159-801-6507-31940	433.96	INSTRUCTOR-RECREATION CLASS		323711	
						433.96
ALHAMBRA CAR WASH	0060-801-4211-38400	624.00	CAR WASH		323712	
						624.00
ALLDATA LLC	0060-801-4211-31950	1,500.00	VEHICLE DIAGNOSTIC SOFTWARE		323713	
						1,500.00
ALLSTAR FIRE EQUIPMENT INC.	0010-801-3210-22300	1,793.90	LEATHER SHIELDS FOR HELMETS		475 **	
						1,793.90
AMERICAN RED CROSS	0010-801-6503-22300	950.00	AQUATIC CPR/AED TRAINING		476 **	
						950.00
ANELLE MANAGEMENT SERVICES, INC.	0060-801-4211-38400	90.00	BIT INSPECTIONS-UNIT 937		477 **	
						90.00
ARAMARK UNIFORM & CAREER APPAREL GF	0060-801-4211-22300	58.42	UNIFORM CLEANING		478 **	
	0060-801-4211-22300	63.47	UNIFORM CLEANING		478 **	

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
ARAMARK UNIFORM & CAREER APPAREL GF	0010-801-3210-39050	24.37	UNIFORM CLEANING		478 **	182.28
	0010-801-3210-39050	11.65	UNIFORM CLEANING		478 **	
	0010-801-3210-39050	24.37	UNIFORM CLEANING		478 **	
ARGIL BLDG. MATERIAL CO.	0110-801-4202-23600	191.63	STREETS CONCRETE MIX		323714	383.26
	0110-801-4202-23600	191.63	STREETS CONCRETE MIX		323714	
ATHENS SERVICES	0043-801-4208-41200	402,770.61	REFUSE COLLECTION SERVICES		323715	402,770.61
BAKER & TAYLOR INC	0010-801-6002-40000	37.77	BOOK(S) 2		323716	
	0010-801-6002-40000	17.93	BOOK(S) 1		323716	
	0010-801-6002-40000	27.77	BOOK(S) 3		323716	
	0010-801-6002-40000	37.27	BOOK(S) 3		323716	
	0010-801-6002-40000	831.47	BOOK(S) 45		323716	
	0010-801-6002-40000	17.30	BOOK(S) 1		323716	
	0010-801-6002-40000	18.15	BOOK(S) 2		323716	
	0010-801-6002-40000	25.60	BOOK(S) 1		323716	
	0010-801-6002-40000	32.78	BOOK(S) 2		323716	
	0010-801-6002-40000	13.24	BOOK(S) 2		323716	
	0010-801-6002-40000	91.66	BOOK(S) 10		323716	
	0010-801-6002-40000	120.78	BOOK(S) 7		323716	
	0010-801-6002-40000	37.15	BOOK(S) 3		323716	
	0010-801-6002-40000	11.49	BOOK(S) 1		323716	
	0010-801-6002-40000	321.16	BOOK(S) 26		323716	
	0010-801-6002-40000	242.51	BOOK(S) 12		323716	
	0010-801-6002-40000	650.86	BOOK(S) 35		323716	
	0010-801-6002-40000	6.61	BOOK(S) 1		323716	
	0010-801-6002-40000	17.94	BOOK(S) 1		323716	
	0010-801-6002-40000	16.66	BOOK(S) 1		323716	

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
BAKER & TAYLOR INC	0010-801-6002-40000	322.24	BOOK(S) 23		323716	
	0010-801-6002-40000	17.30	BOOK(S) 1		323716	
	0010-801-6002-40000	31.10	BOOK(S) 2		323716	
	0010-801-6002-40000	11.52	BOOK(S) 1		323716	
	0010-801-6002-40000	1,830.55	BOOK(S) 112		323716	
	0010-801-6002-40000	33.09	BOOK(S) 5		323716	
	0010-801-6002-40000	16.03	BOOK(S) 1		323716	
	0010-801-6002-40000	27.43	BOOK(S) 2		323716	
	0010-801-6002-40000	10.61	BOOK(S) 1		323716	
	0010-801-6002-40000	22.43	BOOK(S) 1		323716	
	0010-801-6002-40000	29.82	BOOK(S) 2		323716	
	0010-801-6002-40000	35.89	BOOK(S) 2		323716	
	0010-801-6002-40000	8.90	BOOK(S) 1		323716	
	0010-801-6006-40000	15.89	BOOK(S) 1		323716	
	0010-801-6006-40000	13.25	BOOK(S) 1		323716	
	0010-801-6006-40000	71.21	BOOK(S) 4		323716	
	0010-801-6006-40000	60.94	BOOK(S) 4		323716	
	0010-801-6006-40000	130.31	BOOK(S) 10		323716	
	0010-801-6006-40000	15.88	BOOK(S) 2		323716	
	0010-801-6006-40000	81.86	BOOK(S) 5		323716	
	0010-801-6006-40000	15.89	BOOK(S) 1		323716	
	0010-801-6006-40000	764.73	BOOK(S) 63		323716	
	0010-801-6006-40000	5.76	BOOK(S) 1		323716	
	0010-801-6006-40000	17.91	BOOK(S) 2		323716	
	0010-801-6006-40000	11.52	BOOK(S) 1		323716	
	0010-801-6006-40000	25.73	BOOK(S) 3		323716	
	0010-801-6006-40000	8.96	BOOK(S) 1		323716	
	0010-801-6006-40000	24.68	BOOK(S) 2		323716	
	0010-801-6006-40000	42.32	BOOK(S) 4		323716	

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
BAKER & TAYLOR INC	0010-801-6006-40000	47.98	BOOK(S) 4		323716	
	0010-801-6006-40000	984.76	BOOK(S) 49		323716	
	0010-801-6006-40000	2,120.74	BOOK(S) 130		323716	
	0010-801-6006-40000	16.01	BOOK(S) 1		323716	
	0010-801-6006-40000	15.89	BOOK(S) 1		323716	
	0010-801-6006-40000	59.13	BOOK(S) 4		323716	
	0010-801-6006-40000	95.72	BOOK(S) 8		323716	
	0010-801-6006-40000	31.08	BOOK(S) 2		323716	
	0010-801-6006-40000	9.91	BOOK(S) 1		323716	
	0010-801-6006-40000	2,334.42	BOOK(S) 163		323716	
	0010-801-6006-40000	25.90	BOOK(S) 2		323716	
	0010-801-6006-40000	16.86	BOOK(S) 1		323716	
	0010-801-6006-40000	40.58	BOOK(S) 4		323716	
	0010-801-6006-40000	4.62	BOOK(S) 1		323716	
	0010-801-6006-40000	54.43	BOOK(S) 5		323716	
	0010-801-6006-40000	115.36	BOOK(S) 10		323716	
	0010-801-6006-40000	203.57	BOOK(S) 11		323716	
	0010-801-6006-40000	225.28	BOOK(S) 14		323716	
	0010-801-6006-40000	39.21	BOOK(S) 4		323716	
	0010-801-6006-40000	18.26	BOOK(S) 2		323716	
	0010-801-6006-40000	10.88	BOOK(S) 1		323716	
	0010-801-6006-40000	13.25	BOOK(S) 1		323716	
	0010-801-6006-40000	5.12	BOOK(S) 1		323716	
	0010-801-6006-40000	54.71	BOOK(S) 4		323716	
	0010-801-6006-40000	109.80	BOOK(S) 8		323716	
	0010-801-6006-40000	157.25	BOOK(S) 132		323716	
	0010-801-6006-40000	64.52	BOOK(S) 4		323716	
	0010-801-6006-40000	173.95	BOOK(S) 11		323716	
	0010-801-6006-40000	10.88	BOOK(S) 1		323716	

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
BAKER & TAYLOR INC	0010-801-6006-40000	10.86	BOOK(S) 1		323716	
	0010-801-6006-40000	140.63	BOOK(S) 13		323716	
	0010-801-6006-40000	55.94	BOOK(S) 3		323716	
	0010-801-6006-40000	75.46	BOOK(S) 5		323716	
	0010-801-6006-40000	77.93	BOOK(S) 5		323716	
						13,700.74
BARTEL ASSOCIATES LLC	0012-801-5102-31850	5,450.00	ACTUARIAL SERVICES	19-0204	323717	
						5,450.00
BEAR COMMUNICATIONS INC	0362-801-3103-22750	2,037.80	MOTOROLA BATTERIES		479 **	
						2,037.80
BEHAVIORAL ANALYSIS TRAINING, INC.	0136-801-3101-33250	481.00	POST TRAINING		323718	
						481.00
KATALINA BELTRAN	0159-801-6507-31940	2,818.77	INSTRUCTOR-RECREATION CLASS		480 **	
						2,818.77
BISHOP COMPANY	0010-801-6517-24100	212.12	DUST PANS, TRASH CANS		323719	
						212.12
CALIFORNIA POLICE CHIEFS ASSOCIATION	0010-801-3101-39300	145.00	MEMBERSHIP		323720	
						145.00
	0136-801-3101-33250	2,250.00	POST TRAINING		323721	
						2,250.00
CALOX, INC	0010-801-3220-24200	29.75	CYLINDER OXYGEN		481 **	
	0010-801-3220-24200	21.25	CYLINDER OXYGEN		481 **	
						51.00
CANON FINANCIAL SERVICES, INC.	0109-801-6511-22750	186.57	COPIER MACHINE RENTAL		482 **	
	0010-801-1403-37500	1,426.11	COPIER MACHINE RENTAL		482 **	
	0010-801-4212-37500	1,818.42	COPIER MACHINE RENTAL	19-0166	482 **	
	0010-801-3205-37500	798.32	COPIER MACHINE RENTAL	19-0166	482 **	
	0010-801-1701-37500	1,818.42	COPIER MACHINE RENTAL		482 **	

** Indicates an ACH-Payment transaction

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
CANON FINANCIAL SERVICES, INC.	0010-801-4209-37500	999.01	COPIER MACHINE RENTAL		482 **	
	0010-801-3115-38400	316.28	COPIER MACHINE RENTAL		482 **	7,363.13
CANON SOLUTIONS AMERICA, INC	0010-801-3210-37500	1,542.50	COPIER MAINTENANCE		483 **	1,542.50
DAVID CASTELLANO	0136-801-3101-33250	54.00	POST TRAINING		323722	54.00
CDWG GOVERNMENT INC	0010-850-1404-38400	3,573.90	NUANCE POWER PDF		323723	3,573.90
PETER CHAN	0010-801-1101-11100	80.00	MAYOR'S EXPENSES		323724	
	0043-801-1101-11100	60.00	MAYOR'S EXPENSES		323724	
	0092-801-1101-11100	60.00	MAYOR'S EXPENSES		323724	200.00
GUILLERMO J. CHAVEZ	0010-801-6508-39300	103.61	CPRS CONFERENCE		323725	103.61
CINTAS CORPORATION NO. 3	0010-801-6505-22150	179.69	JANITORIAL SUPPLIES-LANGLEY		323726	179.69
CLEAN ENERGY	0109-801-4201-31950	285.07	CNG FUEL		323727	285.07
CODE RED FIRE INC.	0010-801-3210-38400	97.95	EXTINGUISHERS SERVICES		323728	97.95
COLLICUTT ENERGY SERVICES INC	0010-801-4210-38100	318.32	REPLACE BATTERY	19-0007	484 **	
	0010-801-4210-38100	372.41	REPLACE BATTERY	19-0007	484 **	690.73
COMPRESSED AIR SPECIALITIES INC	0010-801-3210-38400	1,272.55	FIRE-AIR COMPRESSOR SERVICE		485 **	1,272.55
DAILY JOURNAL CORPORATION	0010-850-1301-31750	217.65	LEGAL NOTICE	19-0316	486 **	217.65

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
DANIEL SCOTT BUEHLER	0010-801-3104-31950	2,200.00	BACKGROUND INVESTIGATION	19-0319	323729	2,200.00
DELL MARKETING LP	0010-801-6003-38400	5,466.09	COMPUTER, MONITORS	19-0355	487 **	
	0010-801-6003-38400	6,888.22	COMPUTER, MONITORS	19-0354	487 **	
	0010-801-6003-38400	5,469.37	COMPUTER, MONITORS	19-0356	487 **	
	0010-801-3115-38400	2,274.57	COMPUTER, MONITORS		487 **	
	0092-801-4222-38400	5,007.00	COMPUTER, MONITORS	19-0372	487 **	
	0092-801-4223-38400	2,311.00	COMPUTER, MONITORS	19-0372	487 **	
	0063-801-5004-99055	5,066.44	COMPUTER, MONITORS	19-0372	487 **	
	0010-801-1404-38400	3,877.89	COMPUTER, MONITORS	19-0371	487 **	
	0010-801-1403-38400	465.10	MONITORS		487 **	
	0010-801-1403-38400	187.22	TONERS		487 **	
	0010-801-3103-22750	36.78	DVD WRITER		487 **	
	0063-801-5004-99055	24,768.83	COMPUTERS, MONITORS	19-0373	487 **	
	0010-801-1404-38400	0.02	COMPUTERS, MONITORS		487 **	
	0163-850-6005-21350	360.70	COMPUTERS, MONITORS	19-0338	487 **	
	0142-801-6005-38400	3,935.35	COMPUTERS, MONITORS	19-0338	487 **	66,114.58
DELTA DENTAL OF CALIFORNIA	0010-701-0010-08100	223.00	REFUND COBRA 4/1/18		323730	223.00
DEPARTMENT OF HEALTH CARE SERVICES	0465-701-0465-05400	16,475.19	EMERGENCY TRANSPORT SVC GEMT		323731	16,475.19
DEPARTMENT OF JUSTICE	0010-801-1801-39550	230.00	FINGERPRINT PROCESSING		488 **	
	0010-701-0010-03710	1,151.00	FINGERPRINT PROCESSING		488 **	1,381.00
DEPT OF TRANSPORTATION	0022-801-4206-41100	2,763.87	TRAFFIC SIGNALS & LIGHTING		323732	2,763.87
DIRECTV, LLC	0010-801-3230-32050	112.33	SERVICES AT EOC		323733	

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
						112.33
DIVERSIFIED ALARM SERVICE	0010-801-4210-38400	135.00	CENTRAL MONITORING SERVICES	19-0116	489 **	135.00
DUAL CORE LLC	0010-801-3101-22750	152.41	RIBBON		323734	152.41
GEORGE DUONG	0159-801-6507-31940	72.03	INSTRUCTOR-RECREATION CLASS		323735	
	0159-801-6507-31940	313.07	INSTRUCTOR-RECREATION CLASS		323735	385.10
EARTHWALK COMMUNICATIONS, INC.	0010-801-3230-24100	2,997.00	POWER HUBS, CHARGING SYSTEMS	19-0370	490 **	
	0010-801-3230-24100	284.72	POWER HUBS-USE TAX	19-0370	490 **	
	0010-431	284.72-	POWER HUBS-USE TAX		490 **	2,997.00
DEAN N EDDOW	0159-801-6507-31940	673.53	INSTRUCTOR-RECREATION CLASS		323736	673.53
DAVID ELLIOTT	0010-801-3102-22300	150.85	UNIFORM REIMBURSEMENT		323737	150.85
EMERGENCY RESPONSE CRIME SCENE CLEA	0010-801-3103-38400	650.00	DECONTAMINATION		323738	650.00
EMPIRE CLEANING SUPPLY	0010-801-6505-22150	323.90	JANITORIAL SUPPLIES-LANGLEY		323739	
	0178-801-6502-38250	369.44	JANITORIAL SUPPLIES-RECREATION		323739	
	0010-801-6517-22150	73.79	JANITORIAL SUPPLIES-PARKS	19-0093	323739	
	0010-801-3113-22600	748.86	JANITORIAL SUPPLIES-POLICE		323739	1,515.99
ENOVATIVE CONSTRUCTION LLC	0010-701-0010-06100	913.54	REFUND PLAN CHECK & PERMIT FEE		323740	
	0010-701-0010-06330	100.79	REFUND PLAN CHECK & PERMIT FEE		323740	
	0010-701-0010-02500	124.12	REFUND PLAN CHECK & PERMIT FEE		323740	
	0010-450-1703-02520	22.40-	REFUND PLAN CHECK & PERMIT FEE		323740	
	0010-450-1701-02530	44.80-	REFUND PLAN CHECK & PERMIT FEE		323740	

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
ENOVATIVE CONSTRUCTION LLC	0010-701-0010-09200	0.09	REFUND PLAN CHECK & PERMIT FEE		323740	
	0010-701-0010-09202	1.00-	REFUND PLAN CHECK & PERMIT FEE		323740	1,070.34
ENTERPRISE FM TRUST	0060-801-4211-37800	6,033.78	POLICE LEASED VEHICLES	19-0008	491 **	6,033.78
RYAN ESQUIBEL	0136-801-3101-33250	90.00	POST TRAINING		323741	90.00
EUROFINS EATON ANALYTICAL, INC.	0093-801-4226-31950	3,090.00	WATER ANALYSIS	19-0185	323742	
	0093-801-4227-31950	1,740.00	WATER ANALYSIS	19-0185	323742	
	0093-801-4229-23300	6,355.00	WATER ANALYSIS	19-0185	323742	
	0093-801-4230-31950	4,035.00	WATER ANALYSIS	19-0185	323742	
	0093-801-4231-31950	215.00	WATER ANALYSIS	19-0185	323742	15,435.00
EZEQUIEL LOPEZ VELASCO	0010-801-3113-38250	2,326.88	JAIL JANITORIAL SERVICES	19-0165	323743	2,326.88
BRUCE FALLON	0060-801-4211-39400	165.00	FLEET-RECERTIFICATION		323744	165.00
FORD OF MONTEBELLO	0060-801-4211-23500	204.10	MIRROR-UNIT 038		323745	
	0060-801-4211-23500	80.48	HEATER KNOBS		323745	
	0060-801-4211-23500	504.36	FLOOR MATS,STEP-UNIT 140		323745	
	0060-801-4211-23500	428.15-	STEP-CREDIT		323745	
	0060-801-4211-23500	23.94	AIR VENT		323745	
	0060-801-4211-23500	653.43	INSTRUMENT CLUSTER-UNIT 899		323745	1,038.16
WINNIE FUNG	0159-801-6507-31940	181.18	INSTRUCTOR-RECREATION CLASS		323746	181.18
GALLADE CHEMICAL, INC.	0092-801-4222-23300	1,180.41	WATER CHEMICALS		323747	1,180.41

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
GALLS, LLC	0010-801-3210-22310	37.95	UNIFORMS-C CALLOWAY		492 **	
	0010-801-3210-22310	17.47	UNIFORMS-J CHAPMAN		492 **	
	0010-801-3210-22310	49.94	UNIFORMS-R DEROSA		492 **	
	0010-801-3210-22310	404.39	UNIFORMS-M LENNNI		492 **	
	0010-801-3210-22310	27.79	UNIFORMS-M KHAIL		492 **	
	0010-801-3210-22310	252.08	UNIFORMS-A RESPICIO		492 **	
	0010-801-3210-22310	45.66	UNIFORMS-P SANTANA		492 **	
	0010-801-3210-22310	119.52	UNIFORMS-K TEMPLEMAN		492 **	
	0010-801-3210-22310	33.89	UNIFORMS-K TEMPLEMAN		492 **	
	0010-801-3210-22310	281.25	UNIFORMS-K TEMPLEMAN		492 **	
	0010-801-3210-22310	190.29	UNIFORMS-R TULLIUS		492 **	
	0010-801-3210-22310	52.13	UNIFORMS-R TULLIUS		492 **	
	0010-801-3210-22310	538.41	UNIFORMS-R WEDDLE		492 **	
	0010-801-3210-22310	39.37	UNIFORMS-R WEDDLE		492 **	
	0010-801-3210-22310	39.37	UNIFORMS-R WEDDLE		492 **	
	0010-801-3210-22310	119.52	UNIFORMS-R WEISSENBERGER		492 **	
	0010-801-3210-22310	134.80	UNIFORMS-R WEISSENBERGER		492 **	
	0010-801-3210-22310	104.30	UNIFORMS-R WEISSENBERGER		492 **	
	0010-801-3205-22310	105.07	UNIFORMS-G GOMEZ		492 **	
	0010-801-3205-22310	105.07-	UNIFORMS-C GOMEZ-CREDIT		492 **	
						2,488.13
GAMEROOM SPECIALIST, INC.	0010-801-6508-38400	838.00	BILLIARDS TABLE REPAIR		323748	838.00
GARFIELD MEDICAL CENTER	0010-801-3113-22600	24.00	PHYSICAL		323749	24.00
GARVEY EQUIPMENT COMPANY	0060-801-4211-38400	731.69	WEED WHACKERS MAINTENANCE		493 **	731.69
JOSE E. GIRON	0159-801-6507-31940	106.13	INSTRUCTOR-RECREATION CLASS		323750	106.13

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VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
GRICELDA GOMEZ	0010-801-3210-39050	15.69	UNIFORM CLEANING		323751	
	0010-801-3210-39050	15.69	UNIFORM CLEANING		323751	
	0010-801-3210-39050	12.63	UNIFORM CLEANING		323751	
	0010-801-3210-39050	15.69	UNIFORM CLEANING		323751	
	0010-801-3210-39050	15.69	UNIFORM CLEANING		323751	
	0010-801-3210-39050	15.69	UNIFORM CLEANING		323751	
	0010-801-3205-39400	359.88	CFPI ANNUAL WORKSHOP		323751	450.96
KELLY A. GORDON	0010-801-3114-22310	65.98	UNIFORM REIMBURSEMENT		323752	
	0010-801-3120-22310	145.00	UNIFORM REIMBURSEMENT		323752	210.98
LOUIS GORDON	0152-801-2206-38620	910.00	HOME REHAB-218 AVONDALE	19-0223	323753	910.00
GOVCONNECTION INC.	0010-801-1702-22750	49.26	CELL PHONE CASE		323754	
	0010-801-1403-21350	42.43	POWER STRIP		323754	
	0010-801-1403-21350	61.02	MEMORY CARDS		323754	
	0010-801-1403-21350	19.66	MEMORY CARD		323754	
	0010-801-1403-21350	25.08	HDMI CABLES		323754	
	0010-801-1403-21350	83.11	POWER STRIPS		323754	280.56
GRAINGER	0022-801-4202-23900	125.16	SAFETY GLASSES		323755	
	0110-801-4202-23600	2,245.96	CLEANING SOLVENT	19-0184	323755	2,371.12
H & H AUTO PARTS WHOLESALE	0060-801-4211-23500	11.76	AC FILTER-UNIT 123	19-0155	323756	
	0060-801-4211-23500	21.97	AC FILTER	19-0155	323756	
	0060-801-4211-23500	27.38-	CREDIT	19-0155	323756	6.35
SCOTT HABERLE	0349-801-3201-39400	40.51	FOOD FOR VOLUNTEERS		323757	

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SCOTT HABERLE	0349-801-3201-39400	66.64	FOOD FOR VOLUNTEERS		323757	107.15
HACH COMPANY (AKA ELE	0092-801-4222-23700	792.52	WATER ANALYSIS SUPPLIES		323758	
	0092-801-4222-23700	530.66	WATER ANALYSIS SUPPLIES		323758	
	0092-801-4222-23700	72.59	WATER ANALYSIS SUPPLIES		323758	1,395.77
HANSON AGGREGATES	0110-801-4202-23600	602.79	ASPHALT		323759	602.79
HAROLD'S KEY SHOP, INC.	0010-801-4210-38100	180.00	KEY/LOCK SERVICES		494 **	
	0010-801-4202-23950	176.21	KEY/LOCK SERVICES		494 **	
	0010-801-4210-38100	116.96	KEY/LOCK SERVICES		494 **	
	0010-801-4210-38100	114.49	KEY/LOCK SERVICES		494 **	
	0010-801-4210-38100	90.00	KEY/LOCK SERVICES		494 **	677.66
HARRINGTON INDUSTRIAL PLASTICS LLC	0092-801-4222-23300	84.10	SLOTTED PEST		495 **	
	0092-801-4222-23300	147.33	ADAPTERS, COUPLINGS		495 **	231.43
HDL COREN & CONE	0010-801-1403-31400	4,562.50	PROPERTY TAX SERVICES	19-0151	323760	4,562.50
HOLLIDAY ROCK CO INC	0110-801-4202-23600	460.44	WASHED CONSTRUCTION SAND		323761	460.44
HOME DEPOT CREDIT SERVICES	0010-801-3210-22750	43.73	WEED & GRASS KILLER		323762	
	0010-801-4202-23950	26.18	MASKING TAPE, KNIFE		323762	
	0010-801-4210-23300	84.15	GASKET, MASONRY DRILL BIT		323762	
	0010-801-4210-38100	135.67	OUTLET EXTENDER, USB CABLES		323762	
	0092-801-4222-23400	82.02	LED STICK LIGHT, BOARD HOLDERS		323762	
	0010-801-6517-22100	49.18	ROUGHNECK TRASH CANS		323762	
	0010-801-4210-23100	17.45	PAINTS		323762	

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HOME DEPOT CREDIT SERVICES	0010-801-4210-23100	15.29	PAINTS		323762	
	0010-801-6517-23100	22.82	COUPLING,BIT HOLDER	19-0096	323762	
	0176-801-6516-24100	39.95	COUPLING,BIT HOLDER		323762	
	0110-801-4202-23600	100.32	PIPES,BUCKET,ROLLER,FRAME		323762	
	0010-801-4210-38100	31.23	LUBE,PIPE REPAIR TAPE KIT		323762	
	0010-801-4210-23100	60.67	CANVAS,PAINT		323762	
	0010-801-4210-23300	296.75	FAUCET,CABLE TIE,VALVE		323762	
	0010-801-4210-23300	83.22-	FAUCET-CREDIT		323762	
	0010-801-4210-23300	24.45-	DRAIN CLEANER RENTAL-CREDIT		323762	
	0010-801-4210-23400	435.81	SHELF WELDED UNIT		323762	
						1,333.55
INTERNATIONAL ASSO OF PLUMBING & ME	0010-801-1703-39300	300.00	MEMBERSHIP		323763	
						300.00
INTERNATIONAL CODE COUNCIL, INC	0010-801-1703-39350	129.91	CODE BOOK		496 **	
						129.91
INTERWEST CONSULTING GROUP, INC	0010-801-1703-31950	237.50	PLAN CHECK SERVICES	19-0010	497 **	
	0010-801-1703-31950	427.50	PLAN CHECK SERVICES	19-0010	497 **	
						665.00
IP LEARNING CENTER	0159-801-6507-31940	4,380.62	INSTRUCTOR-RECREATION CLASS		323764	
						4,380.62
SHELLY MARIE ISHIDA	0159-801-6507-31940	457.88	INSTRUCTOR-RECREATION CLASS		323765	
						457.88
JAVIER PARADA	0349-801-3201-39400	295.00	FIRE EQUIPMENT MAINTENANCE		323766	
						295.00
JCL TRAFFIC SERVICES	0022-801-4206-23800	408.96	STEEL BANDING	19-0058	498 **	
						408.96
JEANINE CARR	0159-801-6507-31940	1,902.30	INSTRUCTOR-RECREATION CLASS		323767	
						1,902.30

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JEDA WORKS	0152-801-2206-38650	390.00	HOUSING REHAB SERVICES	19-0196	323768	
	0152-801-2206-38650	390.00	HOUSING REHAB SERVICES	19-0196	323768	
	0152-801-2206-38650	585.00	HOUSING REHAB SERVICES	19-0196	323768	
	0152-801-2206-38650	325.00	HOUSING REHAB SERVICES	19-0196	323768	
	0152-801-2206-38650	130.00	HOUSING REHAB SERVICES	19-0196	323768	
	0152-801-2206-38650	520.00	HOUSING REHAB SERVICES	19-0196	323768	
	0152-801-2206-38650	1,430.00	HOUSING REHAB SERVICES	19-0196	323768	
	0152-801-2206-38650	325.00	HOUSING REHAB SERVICES	19-0196	323768	
	0152-801-2206-31850	1,755.00	HOUSING REHAB SERVICES		323768	
						5,850.00
JHM SUPPLY INC	0010-801-6517-23300	365.55	MEDALLION DWARF, FALCON ROTOR		499 **	
						365.55
GUSTAVO JIMENEZ JR	0010-801-3112-22310	362.50	UNIFORM REIMBURSEMENT		500 **	
	0010-801-3114-22310	39.60	UNIFORM REIMBURSEMENT		500 **	
						402.10
JOHN L. HUNTER & ASSOC., INC.	0184-801-4208-31950	865.00	USED OIL PROGRAM	19-0174	501 **	
	0043-801-4203-31950	1,915.00	NPDES PROGRAM	19-0174	501 **	
						2,780.00
JOHNSON CONTROLS FIRE PROTECTION	0010-801-4210-38100	1,064.00	LANGLEY KITCHEN HOOD INSPECTIO	19-0041	323769	
	0010-801-4210-38100	2,261.00	LANGLEY KITCHEN HOOD INSPECTIO		323769	
						3,325.00
RICHARD KAGEYAMA	0159-801-6507-31940	356.01	INSTRUCTOR-RECREATION CLASS		323770	
						356.01
GABRIELA KASANJIAN	0159-801-6507-31940	536.09	INSTRUCTOR-RECREATION CLASS		323771	
						536.09
KEYSTONE UNIFORM CENTERS	0075-450-0075-08420	102.58	UNIFORMS-TORRES (TRUST)		323772	
	0075-450-0075-08420	54.04	UNIFORMS-GUDION (TRUST)		323772	
	0010-801-3113-22310	17.89	UNIFORMS-K GORDON		323772	

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KEystone UNIFORM CENTERS	0010-801-3114-22310	79.02	UNIFORMS-K GORDON		323772	253.53
KNIGHT COMMUNICATIONS INC	0010-801-3115-31700	1,537.50	IT MANAGEMENT SERVICE	19-0129	323773	
	0362-801-3115-31700	8,962.50	IT MANAGEMENT SERVICE	19-0129	323773	
	0010-801-1301-38400	527.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0010-801-1404-38400	492.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0043-801-1404-38400	581.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0092-801-1404-38400	758.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0010-801-1701-38400	400.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0010-801-1702-38400	400.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0010-801-1703-38400	400.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0010-801-1801-38400	778.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0010-801-3115-38400	1,726.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0010-801-3201-38400	952.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0022-801-4202-38400	556.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0092-801-4210-38400	208.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0060-801-4211-38400	1,238.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0043-801-4212-38400	417.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0092-801-4220-38400	1,417.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0010-801-6001-38400	1,083.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0010-801-6502-38400	797.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0093-801-4226-38400	167.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0093-801-4227-38400	167.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0093-801-4229-38400	167.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0093-801-4230-38400	167.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0093-801-4231-38400	167.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0094-801-4226-38400	167.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0094-801-4227-38400	167.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0094-801-4229-38400	167.00	IT MANAGEMENT SERVICE	19-0129	323773	

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KNIGHT COMMUNICATIONS INC	0094-801-4230-38400	167.00	IT MANAGEMENT SERVICE	19-0129	323773	
	0094-801-4231-38400	167.00	IT MANAGEMENT SERVICE	19-0129	323773	
						24,900.00
KNOWLES-MCNIFF	0010-801-1404-31700	5,006.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0010-801-3115-31700	599.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0010-801-3220-31700	209.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0010-801-6001-31700	803.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0043-801-1404-31700	1,571.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0092-801-1404-31700	1,964.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0092-801-4221-31700	989.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0093-801-4226-31700	204.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0093-801-4227-31700	241.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0093-801-4229-31700	193.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0093-801-4230-31700	204.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0093-801-4231-31700	246.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0094-801-4226-31700	42.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0094-801-4227-31700	52.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0094-801-4229-31700	40.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0094-801-4230-31700	42.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0094-801-4231-31700	53.00	FINANCE SOFTWARE MAINTENANCE		502 **	
	0094-801-4232-31700	42.00	FINANCE SOFTWARE MAINTENANCE		502 **	
						12,500.00
KOA CORPORATION	0010-801-4212-31950	2,000.00	EVENTS TRAFFIC CONTROL	19-0322	323774	
						2,000.00
LAWN MOWER CORNER/KNG POWER EQUIPME	0092-801-4222-23700	632.86	SPRAYER, BLADE, WEEDER		323775	
						632.86
GORDON LI	0010-450-1701-02530	156.00	REFUND PLAN CHECK & PERMIT FEE		323776	
	0010-450-1703-02520	78.00	REFUND PLAN CHECK & PERMIT FEE		323776	
	0010-701-0010-02500	2,752.98	REFUND PLAN CHECK & PERMIT FEE		323776	

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GORDON LI	0010-701-0010-06100	1,185.24	REFUND PLAN CHECK & PERMIT FEE		323776	
	0010-701-0010-09200	21.84	REFUND PLAN CHECK & PERMIT FEE		323776	
	0010-701-0010-09202	4.00	REFUND PLAN CHECK & PERMIT FEE		323776	
	0010-701-0010-02010	239.00	REFUND PLAN CHECK & PERMIT FEE		323776	
						4,437.06
LIFE-ASSIST INC	0010-801-3220-24200	612.10	FIRE MEDICAL SUPPLIES	19-0039	323777	
	0010-801-3220-22350	209.40	FIRE MEDICAL SUPPLIES	19-0039	323777	
	0010-801-3220-22350	782.55	FIRE MEDICAL SUPPLIES	19-0039	323777	
						1,604.05
LINCOLN EQUIPMENT INC.	0010-801-6503-23050	1,009.64	POOL CHEMICALS	19-0049	323778	
	0010-801-6503-23050	164.74	POOL CHEMICALS	19-0049	323778	
						1,174.38
ROBIN LOPEZ	0362-801-3101-39400	150.00	POLICE TRAINING		323779	
						150.00
LOS ANGELES COUNTY FIRE DEPT.	0060-801-3210-38400	1,383.04	REPAIRS-UNIT 950,984	19-0046	323780	
						1,383.04
LOS ANGELES COUNTY SHERIFF'S DEPART	0010-801-3113-22600	867.20	INMATE MEALS SERVICES	19-0037	323781	
						867.20
LOUIS LEE	0109-801-4201-31960	630.00	NEW BUS TEMP DECALS		323782	
						630.00
RICHARD LOUIS	0010-801-3101-22320	224.47	UNIFORM REIMBURSEMENT		323783	
						224.47
LU'S LIGHTHOUSE, INC.	0060-801-4211-23500	86.51	HEADLIGHT FLASH-UNIT 152		323784	
						86.51
LYNN PEAVEY COMPANY	0010-801-3103-22750	190.64	EVIDENCE SUPPLIES		503 **	
						190.64
MARILYNN HARA	0010-801-4209-22300	528.46	STREETS PROMOTION ITEMS		323785	
						528.46

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DAVID MARQUARDT	0349-801-3201-39400	695.00	AUTO EXTRICATION COURSE		323786	695.00
MARUSON TECHNOLOGY CORP.	0092-801-4222-23400	2,149.61	TACOMA UPS SYSTEM		323787	2,149.61
METROPOLITAN TRANSPORTATION	0109-801-6511-41200	2,560.00	TAP CARD SALE	19-0136	323788	2,560.00
REBECCA MINOR	0362-801-3101-39400	150.00	POLICE TRAINING		323789	150.00
MISSION SUPER HARDWARE	0010-801-4210-38100	9.15	NUTS,BOLTS,WASHERS		323790	9.15
TAMAR MOLINA	0159-701-0159-07040	159.00	REFUND RECREATION CLASS		323791	159.00
MOORE IACOFANO GOLTSMAN, INC.	0352-801-5002-99026	93,867.64	GENERAL PLAN UPDATE	19-0376	323792	93,867.64
PETER MORRIS	0159-801-6507-31940	419.64	INSTRUCTOR-RECREATION CLASS		323793	419.64
MR. ROOTER PLUMBING	0010-801-6001-38400	370.00	PLUMBING SERVICES		504 **	
	0010-801-6517-31950	740.00	PLUMBING SERVICES		504 **	
	0010-801-6517-31950	800.00	PLUMBING SERVICES		504 **	
	0092-801-4210-38100	525.00	PLUMBING SERVICES	19-0178	504 **	
	0092-801-4210-38100	525.00	PLUMBING SERVICES	19-0178	504 **	
	0092-801-4210-38100	1,575.00	PLUMBING SERVICES	19-0178	504 **	4,535.00
MARGARET NALBANDIAN	0159-801-6507-31940	1,122.30	INSTRUCTOR-RECREATION CLASS		505 **	1,122.30
NATIONAL CNG & FLEET SERVICE LLC	0060-801-5002-88500	6,104.24	CNG TANK-UNIT 965	19-0317	323794	
	0060-801-5002-88500	6,104.24	CNG TANK-UNIT 975	19-0317	323794	12,208.48

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NETWORK INNOVATIONS US INC.	0010-801-3230-32050	44.20	EOC SATELLITE PHONE SERVICE		323795	44.20
NEW CENTURY MOTORSPORTS LLC	0060-801-4211-38400	298.96	TIRE,BALANCED-UNIT 141		323796	298.96
NITV FEDERAL SERVICES, LLC	0362-801-3101-39400	1,185.00	POLICE TRAINING		323797	1,185.00
NORTH STAR GRAPHICS (DBA)	0010-801-3113-38400	203.50	VEHICLE GRAPHICS-UNIT 987		323798	203.50
O'REILLY AUTO PARTS, LLC	0060-801-4211-23500	26.00	WIPER BLADE-UNIT 061	19-0119	506 **	26.00
OCLC, INC	0010-801-6003-31700	1,148.27	LIBRARY CATALOGING SERVICE		323799	1,148.27
OFFICE DEPOT INC.	0010-801-6502-21350	63.62	PAPER		323800	
	0010-801-6502-21350	354.75	PRINTER INK		323800	
	0010-801-6502-21350	82.00	PRINTER INK		323800	
	0010-801-4212-22700	101.23	INDEX, MARKERS		323800	
	0010-801-1704-21250	22.98	LITERATURE SORTER		323800	
	0010-801-1704-21250	48.34	MESSENGER BAG		323800	
	0010-801-6502-21350	80.50	PAPER, INK		323800	
	0010-801-4209-21350	69.23	PAPER, WIPES, SPONGE, DETERGENT		323800	
	0010-801-6502-21350	76.54	HIGHLIGHTER, INDEX CARD, MARKER		323800	
	0010-801-6502-23050	102.92	PHONE		323800	
	0010-801-6507-31160	547.48	TRASH CANS		323800	
	0010-801-3210-21350	76.02	PEN, KEYBOARD, MOUSE, PADS	19-0090	323800	
	0010-801-3230-21250	2.13	PEN, KEYBOARD, MOUSE, PADS	19-0090	323800	
	0010-801-3210-21300	10.04	PEN, KEYBOARD, MOUSE, PADS	19-0090	323800	
	0010-801-3210-21250	41.14	PAPER, LEGAL PADS	19-0090	323800	
	0010-801-3230-21250	50.30	PAPER, LEGAL PADS	19-0090	323800	

** Indicates an ACH-Payment transaction

**CITY OF MONTEREY PARK
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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
						1,729.22
OFFICE SOLUTIONS	0010-801-1403-22750	532.94	PAPER,FOLDERS,HOLE PUNCHER		323801	
	0010-801-1403-22750	196.08	TONER CARTRIDGE		323801	
	0010-801-1403-22750	32.83	INK CARTRIDGE		323801	
	0010-801-1403-22750	16.41-	INK CARTRIDGE-CREDIT		323801	
	0010-801-1403-22750	16.41	INK CARTRIDGE		323801	
	0010-801-1403-22750	748.15	TONER CARTRIDGE,BINDERS,PAPER		323801	
	0010-801-1403-22750	10.94	DUSTER		323801	
	0010-801-1403-22750	65.65	SEAT CUSHION		323801	
	0010-801-1403-22750	65.65-	SEAT CUSHION-CREDIT		323801	
						1,520.94
NELSON ONG	0159-801-6507-31940	1,498.53	INSTRUCTOR-RECREATION CLASS		323802	
						1,498.53
PACIFIC COAST TOOL & SUPPLY	0092-801-4223-23300	5,877.76	GUNDOMAT PACKAGE	19-0375	323803	
	0092-801-4223-23300	345.47	GUNDOMAT PACKAGE		323803	
						6,223.23
PARTYLINE EVENTS INC.	0022-801-4202-31950	300.00	PUBLIC WORKS DAY RENTAL		507 **	
	0010-801-4212-22700	465.36	PUBLIC WORKS DAY RENTAL		507 **	
	0092-801-4220-22700	140.01	PUBLIC WORKS DAY RENTAL		507 **	
						905.37
PERFORMANCE ELEVATOR CONTRACTORS IN	0010-801-4210-38400	330.00	ELEVATOR MAINTENANCE	19-0059	508 **	
	0010-801-4210-38400	165.00	ELEVATOR MAINTENANCE	19-0059	508 **	
	0010-801-4210-38400	646.50	ELEVATOR MAINTENANCE	19-0059	508 **	
	0010-801-4210-38400	578.50	ELEVATOR MAINTENANCE		508 **	
						1,720.00
PLUMBERS DEPOT INC	0042-801-4204-23700	939.42	LEADER HOSE,FITTINGS	19-0214	323804	
						939.42
ALICE PORTER	0362-801-3101-39400	150.00	POLICE TRAINING		323805	

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
						150.00
PRIORITY LANDSCAPE SERVICES	0010-801-6516-31190	1,925.00	LANDSCAPE SERVICES		509 **	1,925.00
PRISCILA DAVILA & ASSOCIATES, INC.	0169-801-2201-31850	845.00	CDBG REHABILITATION CONSULTING	19-0126	323806	
	0169-801-2201-31850	910.00	CDBG REHABILITATION CONSULTING	19-0126	323806	
	0169-801-2201-31850	1,170.00	CDBG REHABILITATION CONSULTING	19-0126	323806	2,925.00
PUI SHEUNG YUK	0159-801-6507-31940	3,049.20	INSTRUCTOR-RECREATION CLASS		510 **	3,049.20
QUICK CRETE PRODUCTS CORP	0110-801-4202-23600	19,092.42	MONUMENT SIGNS	19-0325	323807	19,092.42
RIVERSIDE COUNTY SHERIFFS DEPT	0136-801-3101-33250	159.00	POST TRAINING		323808	159.00
EVERARDO ROMO	0136-801-3101-33250	36.00	POST TRAINING		323809	36.00
RU SUMMIT, INC.	0010-801-3113-22600	3,612.41	REFRIGERATOR, FREEZER	19-0384	323810	3,612.41
RUDY CONTRERAS	0136-801-3101-33250	36.00	POST TRAINING		323811	36.00
S C FUELS	0060-801-4211-22250	8,715.32	FUEL	19-0017	511 **	8,715.32
SAFETY KLEEN SYSTEM, INC.	0060-801-4211-38400	409.09	WASHER PARTS		323812	409.09
SAN ANDELL SWIMMING POOLS	0092-801-4222-23300	222.98	LIQUID CHLORINE		323813	222.98
SAN GABRIEL VALLEY COUNCIL OF GOVT	0043-801-4203-31950	50,961.00	RIO HONDO LRS MOA COST SHARE		512 **	50,961.00
SAN GABRIEL VALLEY WATER CO.	0093-801-4233-22900	273.57-	WATER SERVICES		323814	

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
SAN GABRIEL VALLEY WATER CO.	0092-801-4222-36300	240.86	WATER SERVICES		323814	
	0092-801-4222-36300	67.00	WATER SERVICES		323814	34.29
SAN LUIS BUTANE DISTRIBUTORS, INC	0060-801-4211-22250	45.59	PROPANE	19-0243	323815	
	0060-801-4211-22250	62.22	PROPANE	19-0243	323815	
	0060-801-4211-22250	60.30	PROPANE	19-0243	323815	
	0060-801-4211-22250	41.68	PROPANE	19-0243	323815	209.79
SECURITY SIGNAL DEVICES INC	0010-801-4210-38100	250.00	ALARM SERVICES		513 **	250.00
SERGIO BALANDRAN	0075-450-0075-09010	362.08	EVENT BANNERS (TRUST)		323816	362.08
SIEMENS INDUSTRY, INC.	0010-801-4210-38150	1,486.00	HVAC REAPIR		323817	1,486.00
JAY SIMPER	0159-801-6507-31940	167.75	INSTRUCTOR-RECREATION CLASS		323818	
	0159-801-6507-31940	167.75	INSTRUCTOR-RECREATION CLASS		323818	335.50
SMARDAN SUPPLY COMPANY	0010-801-4210-23300	162.76	GJ TUBE TRAP		323819	
	0010-801-4210-23300	510.16	BOWLS, FAUCET		323819	
	0010-801-4210-23300	94.84	INFANT CLOSET SEATS		323819	767.76
SMART & FINAL #321	0010-801-3230-39460	87.33	HAM RADIO CLASS REFRESHMENTS		323820	
	0010-801-3210-22750	41.90	FIRE ENGINES WATER CACHE		323820	129.23
SMART ENERGY SYSTEMS LLC	0092-801-4220-24150	560.00	GPS DEVICES		514 **	560.00
SOUTHERN CALIFORNIA GAS COMPANY	0109-801-5002-96067	5,931.00	CST SERVICE FEE	19-0176	323821	
	0165-801-5002-96067	5,931.00	CST SERVICE FEE	19-0176	323821	

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**CITY OF MONTEREY PARK
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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
SOUTHERN CALIFORNIA GAS COMPANY	0109-801-5002-96067	2,757.00	CST MAINTENANCE FEE	19-0176	323821	14,619.00
SPECIAL "T" WATER SYSTEMS, INC.	0092-801-4222-23300	200.00	WATER SOFTENER MAINTENANCE		323822	200.00
STARBOARD TACK SUPPLY INC	0010-801-4210-23300	486.28	FAUCET	19-0245	515 **	
	0010-801-4210-23300	33.69	FAUCET		515 **	
	0010-801-4210-23300	138.97	TOILET		515 **	658.94
STATE OF CALIFORNIA DMV	0010-801-3102-39250	200.00	POLICE-MATURE DRIVER CERT		323823	200.00
STATUS ONE MEDICAL INC	0092-801-4223-21200	32.61	FIRST AID SUPPLIES		516 **	32.61
STETSON ENGINEERS, INC	0093-801-4229-31950	241.22	NPDES APP SERVICES	19-0153	323824	
	0093-801-4230-31950	241.21	NPDES APP SERVICES	19-0153	323824	482.43
SUCCESS PRINTING & SIGN INC.	0092-801-6509-31880	4,284.80	CASCADES	19-0082	323825	4,284.80
KUMIKO TAMURA	0010-701-0010-07950	25.00	REFUND AMBULANCE MEMBERSHIP		323826	25.00
TANGENT COMPUTER INC	0010-850-1404-38400	9,500.00	EMAIL ARCHIVING APPLIANCE		323827	9,500.00
TECHSOUP STOCK	0010-801-6003-38400	290.00	LIBRARY SOFTWARE		323828	290.00
PETER THAI	0159-801-6507-31940	2,469.87	INSTRUCTOR-RECREATION CLASS		323829	2,469.87
LILY THATCHER	0159-801-6507-31940	93.13	INSTRUCTOR-RECREATION CLASS		323830	93.13
THE CODE GROUP INC	0010-801-1703-31950	285.00	PLAN CHECK SERVICE	19-0014	517 **	

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
THE CODE GROUP INC	0010-801-1703-31950	334.45	PLAN CHECK SERVICE	19-0014	517 **	619.45
THE ECOHERO SHOW LLC	0214-801-4208-31950	850.00	EDUCATIONAL SHOWS EXPENSE	19-0169	323831	850.00
THOMSON REUTERS (LEGAL) INC.	0362-801-3104-39100	595.00	INVESTIGATION INFO	19-0013	323832	1,785.00
	0362-801-3104-39100	595.00	INVESTIGATION INFO	19-0013	323832	
	0362-801-3104-39100	595.00	INVESTIGATION INFO	19-0013	323832	
TITO AUTO TRIM	0060-801-4211-38400	480.00	FLEET REPAIR-UNIT 899,117		323833	480.00
TOM'S CLOTHING & UNIFORMS INC	0010-801-3103-22310	98.12	UNIFORMS-V BALTIERRA		323834	
	0010-801-3103-22310	370.10	UNIFORMS-R COTA		323834	
	0010-801-3103-22310	228.83	UNIFORMS-B IGLESIAS		323834	
	0010-801-3103-22310	75.56	UNIFORMS-D DALAZAR		323834	
	0010-801-3103-22310	706.28	UNIFORMS-P YUNG		323834	
	0010-801-3103-22310	177.39	UNIFORMS-S CASTILLO		323834	
	0010-801-3104-22310	290.72	UNIFORMS-L SALAZAR		323834	
	0010-801-3101-22320	76.64	UNIFORMS-R HERNANDEZ		323834	
	0010-801-3101-22310	199.29	UNIFORMS-B LIN		323834	
	0010-801-3101-22310	57.67	UNIFORMS-P PEREZ		323834	
	0010-801-3101-22310	300.00	UNIFORMS-T HONG		323834	
	0010-801-3101-22310	200.37	UNIFORMS-D JOHNSON		323834	
	0010-801-3101-22310	200.36	UNIFORMS-F WOO		323834	
	0010-801-3114-22310	267.18	UNIFORMS-K GARLAND		323834	
	0010-801-3114-22310	297.82	UNIFORMS-I GOEDERS		323834	
	0010-801-3114-22310	136.88	UNIFORMS-C LUNA		323834	
	0010-801-3114-22310	133.59	UNIFORMS-M MKRTICHIAN		323834	
	0010-801-3114-22310	249.65	UNIFORMS-C TOBEY		323834	
	0010-801-4209-22300	169.18	UNIFORMS-J MENDIVIL		323834	

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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
TOM'S CLOTHING & UNIFORMS INC	0010-801-6517-22300	9.86	UNIFORMS-J RODRIGUEZ		323834	
	0010-801-6517-22300	34.45	UNIFORMS-L ROMERO		323834	
	0010-801-6517-22300	96.36	UNIFORMS-J TIEN		323834	
	0010-801-3101-22320	200.00	UNIFORMS-F ACOSTA		323834	
	0010-801-3101-22320	21.90	UNIFORMS-S MEJIA		323834	
	0010-801-3102-22310	300.00	UNIFORMS-S ESTEVEZ		323834	
	0010-801-3102-22310	294.53	UNIFORMS-J RODRIGUEZ		323834	
	0010-801-3103-22310	120.44	UNIFORMS-S CASTILLO		323834	
	0010-801-3112-22310	366.83	UNIFORMS-J HUANG		323834	
	0010-801-3112-22310	49.28	UNIFORMS-J HUANG		323834	
	0010-801-3114-22310	346.55	UNIFORMS-G JIMENEZ		323834	
						6,075.83
LAURA R. TORRES-HOAGLAND	0159-801-6507-31940	86.10	INSTRUCTOR-RECREATION CLASS		323835	
						86.10
TRANSTECH	0010-801-5004-91752	120.00	ADA FACILITY IMPROVEMENTS	19-0220	323836	
						120.00
LAURINDA SU TRUONG	0159-801-6507-31940	734.76	INSTRUCTOR-RECREATION CLASS		323837	
						734.76
DOROTHY TSU	0159-801-6507-31940	210.13	INSTRUCTOR-RECREATION CLASS		323838	
						210.13
UC REGENTS	0010-801-3220-39400	2,931.58	FIRE-CONTINUED EDUCATION	19-0304	323839	
						2,931.58
ULINE, INC.	0060-801-3210-38400	1,095.26	NITRILE GLOVES		518 **	
						1,095.26
UNITED PUMPING SERVICES INC	0022-801-4202-31950	967.14	HAZMAT DISPOSAL		519 **	
						967.14
HARUNA URIU	0159-801-6507-31940	369.03	INSTRUCTOR-RECREATION CLASS		323840	
						369.03

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**CITY OF MONTEREY PARK
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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
DEAN VANDERHEYDEN	0010-801-3101-22320	300.00	UNIFORM REIMBURSEMENT		323841	300.00
VETERINARY HEALTHCARE CENTER	0010-801-3111-31950	50.00	ANIMAL SERVICE/SUPPLIES		323842	
	0010-801-3111-31950	25.00	ANIMAL SERVICE/SUPPLIES		323842	75.00
PAUL VILLALOBOS	0010-801-3103-22310	105.01	UNIFORM REIMBURSEMENT		323843	
	0010-801-3103-22310	35.90	UNIFORM REIMBURSEMENT		323843	140.91
VINNIE'S PORTABLE WELDING	0092-801-4222-23700	900.00	WATER WELDING SERVICES		323844	900.00
VISTA PAINT CO.	0010-801-4202-23950	469.86	PAINT AND SUPPLIES	19-0229	323845	469.86
VULCAN MATERIAL CO	0110-801-4202-23600	1,477.13	ASPHALT	19-0045	323846	
	0110-801-4202-23600	326.01	ASPHALT	19-0045	323846	
	0110-801-4202-23600	366.78	ASPHALT	19-0045	323846	
	0110-801-4202-23600	2,419.65	ASPHALT	19-0045	323846	4,589.57
WALTERS WHOLESALE ELECTRIC CO	0010-801-4210-23400	450.51	STEEL DEVICE BOXES		323847	450.51
WARREN DISTRIBUTING, INC.	0060-801-4211-23500	42.49	FUEL SYSTEM-UNIT 929	19-0154	520 **	
	0060-801-4211-23500	14.99	IGNITION SYS-UNIT 038	19-0154	520 **	
	0060-801-4211-23500	53.48	FILTERS	19-0154	520 **	
	0060-801-4211-23500	127.21	FRT ARM-UNIT 077	19-0154	520 **	
	0060-801-4211-23500	61.54	DAYTIME RUNNING BULBS	19-0154	520 **	
	0060-801-4211-23500	46.73	TIRE SENSOR-UNIT 037	19-0154	520 **	
	0060-801-4211-22250	109.28	LUBRICANTS		520 **	455.72
SHAOYAO SAMUEL WEI	0159-801-6507-31940	1,150.76	INSTRUCTOR-RECREATION CLASS		323848	

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**CITY OF MONTEREY PARK
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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
						1,150.76
WEST COAST ARBORISTS, INC.	0010-801-6516-31190	16,870.00	TREE MAINTENANCE SERVICES	19-0086	521 **	
	0094-801-4227-31950	2,020.00	TREE MAINTENANCE SERVICES	19-0117	521 **	
	0094-801-4229-31950	10,000.00	TREE MAINTENANCE SERVICES	19-0117	521 **	
	0094-801-4230-31950	10,000.00	TREE MAINTENANCE SERVICES	19-0117	521 **	
	0092-801-4222-38500	660.00	TREE MAINTENANCE SERVICES		521 **	
	0094-801-4227-31950	3,780.00	TREE MAINTENANCE SERVICES	19-0117	521 **	
	0094-801-4227-31950	4,200.00	TREE MAINTENANCE SERVICES	19-0117	521 **	
						47,530.00
WEST HEALTH ADVOCATE SOLUTIONS, INC	0010-801-1801-31950	1,698.00	HEALTH ADVOCATE SERVICES		323849	
						1,698.00
WESTCO SERVICE COMPANY	0010-801-4210-38150	900.00	AIR CONDITIONING REPAIR	19-0001	522 **	
						900.00
WESTERN EXTERMINATOR COMPANY	0092-801-4210-38100	1,107.50	PEST CONTROL	19-0075	323850	
						1,107.50
WHITTIER FERTILIZER CO.	0010-801-6517-22100	503.84	FERTILIZER	19-0088	323851	
						503.84
SCOTT WIESE	0010-801-3104-22310	636.85	UNIFORM REIMBURSEMENT		323852	
						636.85
WOLFF LANG CHRISTOPHER ARCHITECTS,	0010-850-5002-99730	42,840.00	FIRE STATION 62 DEVELOPMENT	17-0290	323853	
						42,840.00
BOB WONDRIES FORD	0060-801-4211-23500	67.78	RESET CODE-UNIT 124	19-0271	323854	
						67.78
RICKY WONG	0159-801-6507-31940	81.85	INSTRUCTOR-RECREATION CLASS		323855	
						81.85
THOMAS WONG	0159-801-6507-31940	1,061.61	INSTRUCTOR-RECREATION CLASS		323856	
						1,061.61
X-IGENT PRINTING, INC	0109-801-4201-39250	1,480.32	SPRIT BUS TRANSFERS PRINT		323857	

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CITY OF MONTEREY PARK
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PRINTED WARRANTS

VENDOR NAME	ACCOUNT	AMOUNT	DESCRIPTION	P.O.	CHECK #	TOTAL
						1,480.32
LING ZHANG	0159-801-6507-31940	297.30	INSTRUCTOR-RECREATION CLASS		323858	297.30
ZOLL MEDICAL CORPORATION	0465-801-3201-22750	31,141.80	AUTOPULSE RESUSCITATION SYS	19-0197	323859	31,141.80
ZUMAR INDUSTRIES, INC.	0022-801-4206-23800	182.52	STREET SUPPLIES		323860	
	0022-801-4206-23800	690.64	STREET SUPPLIES		323860	873.16
TOTAL FOR REGULAR WARRANTS						1,733,283.80
	PRINTED	842,427.43				
	ACH-PAYMENTS	890,856.37				

**CITY OF MONTEREY PARK
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TOTAL FOR PREPAID WARRANTS	\$109,041.51
TOTAL FOR PRINTED WARRANTS	\$842,427.43
TOTAL FOR ACH-PAYMENTS	\$890,856.37
TOTAL WARRANTS	\$1,842,325.31
TOTAL VOID CHECKS	3
TOTAL PREPAID CHECKS	52
TOTAL ACH-PAYMENTS PRINTED	50
TOTAL CHECKS PRINTED	152
TOTAL CHECKS ISSUED	254

**CITY OF MONTEREY PARK
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FUND SUMMARY**

FUND	DESCRIPTION	PREPAID	PRINTED	TOTAL
0010	GENERAL FUND	19,259.81	214,557.90	233,817.71
0012	RETIREMENT FUND	0.00	5,450.00	5,450.00
0022	STATE GAS TAX FUND	2,689.35	5,994.29	8,683.64
0042	SEWER FUND	0.00	939.42	939.42
0043	REFUSE FUND	1,301.41	458,275.61	459,577.02
0060	CITY SHOP FUND	0.00	36,984.82	36,984.82
0063	TECHNOLOGY INTERNAL SERV FUND	0.00	30,542.77	30,542.77
0065	PAYROLL CLEARING ACCOUNT	576.00	0.00	576.00
0075	SPECIAL DEPOSITS FUND	32,648.16	518.70	33,166.86
0092	WATER FUND	745.07	35,650.09	36,395.16
0093	WATER TREATMENT WQA-EPA FUND	0.00	17,566.86	17,566.86
0094	WATER TREATMENT CITY FUND	0.00	31,106.00	31,106.00
0109	OPA PROPOSITION A	0.00	59,719.78	59,719.78
0110	MEASURE R FUND	0.00	27,474.76	27,474.76
0136	POST	18.00-	3,106.00	3,088.00
0142	EL CIVIC EDUCATION GRANT	0.00	3,935.35	3,935.35
0152	HOME HOUSING PROGRAM	16,150.00	6,760.00	22,910.00
0159	RECREATION FUND	0.00	25,370.28	25,370.28
0160	ASSET FORFEITURE-JUSTICE	0.00	0.00	0.00
0163	CAL LIBRARY LITERACY SVC GRANT	0.00	360.70	360.70
0165	AIR QUALITY IMPROVEMENT FUND	0.00	5,931.00	5,931.00
0169	CDBG FUND	0.00	2,925.00	2,925.00
0176	MAINTENANCE DISTRICT 93-1	0.00	39.95	39.95
0178	PROP A - PER PARCEL GRANT	0.00	369.44	369.44
0184	USED OIL RECYCLING BLOCK GRANT	0.00	865.00	865.00
0214	BEVERAGE CONTAINER RECYCLING	0.00	850.00	850.00
0349	ELAC INSTRUCTIONAL SERV PROG	1,655.87	1,097.15	2,753.02
0352	GENERAL PLAN REVIEW TRUST	0.00	93,867.64	93,867.64

CITY OF MONTEREY PARK
 FINAL WARRANT REGISTER
 COUNCIL MEETING DATE 05/15/2019
 FUND SUMMARY

FUND	DESCRIPTION	PREPAID	PRINTED	TOTAL
0362	ASSET FORFEITURE - TREASURY	450.00	14,420.30	14,870.30
0443	MTA CLEAN FUEL BUS GRANT	0.00	513,394.00	513,394.00
0458	MSRC NATURAL GAS BUS GRANT	0.00	87,594.00	87,594.00
0465	GROUND EMERG MEDICAL TRANSPORT	15,365.07	47,616.99	62,982.06
0467	HOMELAND SECURITY GRANT - 2016	18,218.77	0.00	18,218.77
	TOTAL	109,041.51	1,733,283.80	1,842,325.31



City Council Staff Report

DATE: May 15, 2019

AGENDA ITEM NO: Consent Calendar
Agenda Item 3-C.

TO: The Honorable Mayor and City Council
FROM: Joseph Leon, City Treasurer
SUBJECT: Monthly Investment Report – April 2019

RECOMMENDATION: It is recommended that the City Council:

- (1) Receive and file the monthly investment report; and
- (2) Take such additional, related, action that may be desirable.

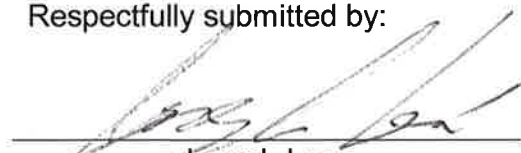
EXECUTIVE SUMMARY:

As of April 30, 2019 invested funds for the City of Monterey Park is \$90,433,629.88.

BACKGROUND:

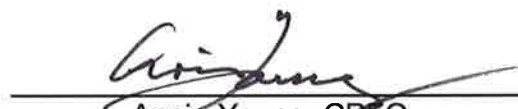
In accordance with the City's Investment Policy, a monthly investment report is presented to the City Council showing the types of investments, dates of maturities, amounts of deposits, rates of interest, and the current market values for securities with maturity more than 12 months. The attached monthly investment report includes a summary investment report for the LA County Pooled Investment Fund, which displays the composition by type for the entire pooled investment fund.

Respectfully submitted by:



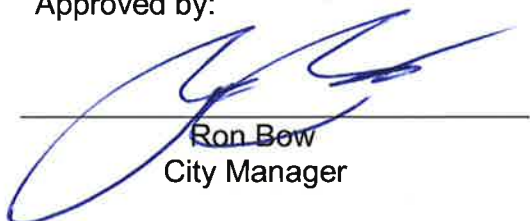
Joseph Leon
City Treasurer

Prepared by:



Annie Yaung, CPFO
Director of Management Services

Approved by:



Ron Bow
City Manager

**CITY OF MONTEREY PARK
INVESTMENT REPORT
AS OF APRIL 30, 2019**

INVESTMENTS PORTFOLIO PROFILE:

TOTAL BALANCE AT 4/30/19

\$ 90,433,629.88

INVESTMENT COMPOSITION

(1) <u>LA COUNTY POOLED INVESTMENT FUND</u>				
<i>(See Schedule A for LA County Pool Composition)</i>				
	ON DEMAND	2.170%		<u>\$ 1,238,626.14</u>
(2) <u>LOCAL AGENCY INVESTMENT FUND</u>				
	ON DEMAND	2.450%		<u>\$ 58,307,003.74</u>
(3) <u>U.S. GOVERNMENT TREASURY BILLS</u>				
	<u>Purchase Date</u>	<u>Maturity Date</u>	<u>Interest Rate</u>	
	11/14/2018	11/7/2019	2.50%	2,000,000
	11/21/2018	5/23/2019	2.36%	1,000,000
	11/27/2018	11/7/2019	2.49%	1,500,000
	11/30/2018	11/7/2019	2.49%	2,000,000
	12/06/2018	6/6/2019	2.35%	2,000,000
	12/20/2018	6/20/2019	2.35%	2,000,000
	12/21/2018	12/5/2019	2.44%	2,000,000
	12/28/2018	12/5/2019	2.39%	2,000,000
	12/28/2018	6/27/2019	2.30%	2,000,000
	01/03/2019	7/5/2019	2.35%	2,000,000
			2.40%	<u>\$ 18,500,000</u>
(4) <u>CERTIFICATES OF DEPOSIT</u>				
	<u>Purchase Date</u>	<u>Maturity Date</u>	<u>Interest Rate</u>	
PACIFIC PREMIER BANK	02/28/18	08/28/19	2.10%	245,000
PREFERRED BANK	03/03/18	09/03/19	2.00%	140,000
ROYAL BUSINESS BANK	06/23/18	06/23/19	2.20%	250,000
AFFINITY FEDERAL BANK	08/03/18	08/02/19	2.65%	245,000
AFFINITY FEDERAL CREDIT UNION	10/15/18	10/15/19	2.85%	245,000
ALLY BANK MIDVALE	10/06/17	10/05/20	1.95%	245,000
AMERICAN EXPRESS BANK	05/03/17	05/04/20	1.80%	245,000
BANK OF HOPE	05/26/17	11/26/19	1.70%	245,000
BANKUNITED NA	02/09/18	02/10/20	2.20%	245,000
BMW BK NORTH AMERICA	09/21/17	03/16/20	1.85%	238,000
BROOKLINE BANK	06/29/17	06/28/19	1.65%	245,000
CAPITAL ONE NATL BANK	10/25/17	10/26/20	2.00%	245,000
CITIBANK NATIONAL BANK	02/07/19	02/08/21	2.65%	245,000
CITIZENS COMMUNITY FED NATIONAL ASSN	03/06/19	03/06/20	2.45%	245,000
COMMERCIAL BANK	06/21/18	06/22/20	2.75%	245,000
COMMUNITY WEST BANK	05/29/18	05/29/19	2.25%	245,000
CONGRESSIONAL BANK	03/01/19	03/02/20	2.45%	245,000
DIRECT CFED CREDIT UNION	11/22/17	11/23/20	2.00%	245,000
DISCOVER BANK	09/01/17	09/01/20	1.90%	245,000
DOUGLAS NATIONAL BANK	05/09/18	05/09/19	2.10%	245,000
ELGA CREDIT UNION	09/19/18	03/19/20	2.70%	245,000
EVERBANK	01/02/18	09/16/19	1.25%	245,000
FIFTH THIRD BANK	05/23/18	05/23/19	2.20%	245,000
FIRST FED SAVINGS & LOAN	12/22/17	12/20/19	2.05%	245,000

**CITY OF MONTEREY PARK
INVESTMENT REPORT
AS OF APRIL 30, 2019**

FIRST FINAL BANK	04/10/18	10/10/19	2.25%	245,000
FIRST MERCHANTS BANK	12/30/16	06/28/19	1.50%	245,000
FIRST TECH FEDERAL CREDIT UNION	10/16/17	10/16/19	1.80%	245,000
GARRETT BANK	05/09/18	05/11/20	2.55%	245,000
GOLDMAN SACHS BANK	10/18/17	10/19/20	1.95%	245,000
GRAND RIVER BANK	11/28/17	05/28/20	1.80%	245,000
GUARANTY BANK	03/15/18	09/15/20	2.40%	245,000
IBERIABANK	05/30/18	11/30/20	2.70%	245,000
KEESLER FEDERAL CREDIT UNION	12/21/18	06/22/20	3.00%	245,000
LAKESIDE BANK CHICAGO	05/10/17	05/11/20	1.65%	245,000
MB FINANCIAL BANK	08/24/17	02/24/20	1.75%	245,000
MEMORIAL CREDIT UNION	08/15/18	08/15/19	2.60%	245,000
MIDLAND BANK	03/22/18	09/23/19	2.20%	245,000
MORGAN STANLEY	12/28/17	12/30/19	2.05%	245,000
MORGAN STANLEY BANK	11/30/17	12/02/19	1.90%	245,000
NATIONWIDE BANK	11/30/17	08/31/20	2.00%	245,000
NEW YORK COMMUNITY BANK	02/28/19	02/28/20	2.45%	245,000
POST OAK BANK	02/21/18	08/21/19	2.05%	245,000
RIA FEDERAL CREDIT UNION	10/12/18	10/11/19	2.75%	245,000
STEARNS BANK	05/31/18	05/29/20	2.70%	245,000
SYNCHRONY BK RETAIL	04/27/18	04/27/20	2.55%	245,000
THIRD FED SAVINGS & LOAN	12/21/17	12/21/20	2.10%	245,000
UNITED BANKERS BANK	05/11/18	11/12/19	2.30%	245,000
UNIVERSITY IOWA CMNTY	04/30/18	04/30/21	2.75%	245,000
VIBRANT CREDIT UNION	12/21/18	06/22/20	2.95%	245,000
WELLS FARGO BANK	02/13/19	02/16/21	2.65%	245,000
WEX BANK	06/02/17	06/02/20	1.80%	245,000
<i>Total CDs (51)</i>			2.213%	<u>\$ 12,388,000.00</u>

OTHER INFORMATION:

BANK BALANCE: ⁽¹⁾ **\$ 5,669,744.00**

AVERAGE MATURITY DAYS 87

AVERAGE INTEREST RATE FOR THE MONTH 2.895%

THE CITY'S INVESTMENT HAS SUFFICIENT LIQUIDITY TO MEET THE CITY'S EXPENDITURE REQUIREMENTS FOR THE NEXT 180 DAYS. THE 180-DAY LIQUIDITY DISCLOSURE IS REQUIRED PER GOVERNMENT CODE 53646.

INTEREST EARNINGS FOR 3RD QUARTER 2018-2019 (CUMULATIVE) **\$399,990.27**

THERE HAVE BEEN NO VARIANCES TO THE INVESTMENT POLICY.

(1) Bank balance is maintained to cover outstanding warrants, payroll checks and on-going operating costs.

POOLED SURPLUS AND SPECIFIC PURPOSE INVESTMENTS
AS OF MARCH 31, 2019

SCHEDULE A

<u>PORTFOLIO PROFILE</u>	<u>Pooled Surplus Investments</u>	<u>Specific Purpose Investments</u>
Inventory Balance at 03/31/19		
At Cost	\$ 31,348,052,695	\$ 173,539,552
At Market	\$ 31,188,591,928	\$ 170,616,858
Repurchase Agreements	\$ -	\$ -
Reverse Repurchase Agreements	\$ -	\$ -
Composition by Security Type:		
Certificates of Deposit	6.54%	14.41%
United States Government and Agency Obligations	64.84%	59.26%
Bankers Acceptances	0.00%	0.00%
Commercial Paper	28.06%	0.00%
Municipal Obligations	0.11%	2.18%
Corporate and Deposit Notes	0.45%	0.00%
Repurchase Agreements	0.00%	0.00%
Asset-Backed	0.00%	0.00%
Other	0.00%	24.15%
1-60 days	39.68%	0.00%
61 days-1 year	11.23%	58.82%
Over 1 year	49.09%	41.18%
Weighted Average Days to Maturity	526	



City Council Staff Report

DATE: May 15, 2019

AGENDA ITEM NO: Consent Calendar
Agenda Item 3-D.

TO: The Honorable Mayor and City Council
FROM: Jim Smith, Chief of Police
SUBJECT: A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF MONTEREY PARK, CALIFORNIA DECLARING MAY 12 – 18, 2019 AS "POLICE WEEK" AND WEDNESDAY, MAY 15, 2019 AS "PEACE OFFICERS MEMORIAL DAY."

RECOMMENDATION:

It is recommended that the City Council:

1. Adopt Resolution no. _____ declaring May 12 – 18, 2019 as "Police Week" in Monterey Park and Wednesday, May 15, 2019 as "Peace Officers Memorial Day"; and
2. Take such additional, related, action that may be desirable.

EXECUTIVE SUMMARY:

The week of May 12 – 18 is recognized as "National Police Week" and May 15 is "Peace Officers Memorial Day." The City Council is requested to approve a Resolution to observe both National Police Week and Peace Officers Memorial Day.

BACKGROUND:

In 1962, President John F. Kennedy proclaimed May 15 as National Peace Officers Memorial Day and the calendar week in which May 15 falls, as National Police Week. Established by a joint resolution of Congress in 1962, National Police Week pays special recognition to those law enforcement officers who have lost their lives in the line of duty for the safety and protection of others.

Communities across the United States will come together during National Police Week—May 12-18—to honor and remember those law enforcement officers who made the ultimate sacrifice, as well as the family members, friends and fellow officers they left behind.

This year, the names of 371 officers killed in the line of duty are being added to the National Law Enforcement Officers Memorial in Washington, DC. These 371 officers include 158 officers who were killed during 2018, plus 213 officers who died in previous years but whose stories of sacrifice had been lost to history until now.

The fallen officers include two members of the law enforcement community in Monterey Park, Officer George Elder who was killed in a shootout in 1961 and Officer William Guidera who was killed in a traffic collision in 1927. In addition to remembering Officers Elder and Guidera, the Police Department also remembers and pays tribute to DEA Special Agents Paul Seema and George Montoya who were killed in the line of during a shootout while working alongside Monterey Park Police Officers during a narcotics investigation in 1989.

In tribute to American law enforcement officers and at the request of the National Law Enforcement Officers Memorial Fund, Public Law 103-322 designates May 15th National Peace Officers Memorial Day, which is one of only two days each year during which government agencies, businesses and residents are to fly their U.S. flags at half staff.

Respectfully submitted and
approved by:



Ron Bow
City Manager

Prepared by:



Jim Smith
Chief of Police

ATTACHMENT 1: Resolution

ATTACHMENT 1

Resolution

RESOLUTION NO. _____

**A RESOLUTION OF THE CITY COUNCIL OF THE
CITY OF MONTEREY PARK, CALIFORNIA
DECLARING MAY 12-18 AS POLICE WEEK IN
MONTEREY PARK AND WEDNESDAY, MAY 15 AS
PEACE OFFICERS' MEMORIAL DAY.**

WHEREAS, National Police Week 2019 honors the service and sacrifice of those law enforcement officers killed in the line of duty while protecting our communities and safeguarding our democracy.

WHEREAS, there are approximately 900,000 law enforcement officers serving in communities across the United States, including the dedicated members of the Monterey Park Police Department;

WHEREAS, there were 61,995 assaults against law enforcement officers in 2017, resulting in approximately 17,902 injuries;

WHEREAS, since the first recorded death in 1791, more than 20,000 law enforcement officers in the United States have made the ultimate sacrifice and been killed in the line of duty, including 2 members of the Monterey Park Police Department, Officer George Elder and Officer William Guidera;

WHEREAS, the names of these dedicated public servants are engraved on the walls of the National Law Enforcement Officers Memorial in Washington, D.C.;

WHEREAS, 371 new names of fallen heroes are being added to the National Law Enforcement Officers Memorial this spring, including 158 officers killed in 2018 and 213 officers killed in previous years;

WHEREAS, the service and sacrifice of all officers killed in the line of duty will be honored during the National Law Enforcement Officers Memorial Fund's 31st Annual Candlelight Vigil, on the evening of May 12, 2019;

WHEREAS, the Candlelight Vigil is part of National Police Week, which takes place this year on May 12-18;

WHEREAS, May 15 is designated as Peace Officers Memorial Day, in honor of all fallen officers and their families and U.S. flags should be flown at half staff;

**NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF MONTEREY PARK
DOES HEREBY RESOLVE, DECLARE, AND DETERMINE AS FOLLOWS:**

SECTION 1. May 12 – 18, 2019 is Police Week in the City of Monterey Park.

RESOLUTION NO.

Page 2

SECTION 2. May 15, 2019 is Peace Officers Memorial Day in Monterey Park and in honor of fallen officers and their families U.S. flags shall be flown at half staff.

SECTION 3. That the City Clerk shall certify to the adoption of this resolution and enter it into the book of original Resolutions.

PASSED, APPROVED, AND ADOPTED this 15th day of May, 2019.

Peter Chan, Mayor
City of Monterey Park,
California

Attest:

Vincent D. Chang, City Clerk
City of Monterey Park
California

RESOLUTION NO.

Page 3

State of California)
County of Los Angeles) ss.
City of Monterey Park)

I, Vincent D. Chang, City Clerk of the City of Monterey Park, California, do hereby certify that the foregoing Resolution No. was duly and regularly adopted by the City Council of the City of Monterey Park at a meeting held on the 15th day of May, 2019, by the following vote:

Ayes:

Naes:

Absent:

Abstain:

Dated this 15th day of May, 2019.

Vincent D. Chang, City Clerk
City of Monterey Park,
California



City Council Staff Report

DATE: May 15, 2019

AGENDA ITEM NO: Consent Calendar
Agenda Item 3-E.

TO: Honorable Mayor and Members of the City Council
FROM: Mark A. McAvoy, Director of Public Works/City Engineer
SUBJECT: Continuance for decision regarding construction of a 54-unit senior citizen housing condominium project – 130-206 South Chandler Avenue.

RECOMMENDATION:

It is recommended that the City Council consider:

- (1) Continuing a final decision regarding this application until the meeting of June 5, 2019; and
- (2) Taking such additional, related, action that may be desirable.

EXECUTIVE SUMMARY:

On April 17, 2019, the City Council reviewed an application for constructing a 54-unit senior citizen housing project at 130-206 South Chandler Avenue. During the meeting, the City Council directed that the staff meet with the applicant to clarify the number of affordable units in the Initial Study/Mitigated Negative Declaration; provide additional parking spaces; and modify a condition of approval requiring the Bradford Pear tree in the public right-of-way. Staff met with the applicant regarding these items. Some additional time is needed to completely address the City Council's concerns regarding the proposed project before the City Council makes a final decision.

Respectfully Submitted by:

Prepared By:


Mark A. McAvoy
Director of Public Works/City
Engineer


Samantha Tewasart
Senior Planner

Approved by:

Reviewed by:

 FOL RAN BOW
Ron Bow
City Manager


Karl H. Berger
Assistant City Attorney



City Council Staff Report

DATE: May 15, 2019

AGENDA ITEM NO: New Business
Agenda Item 5-A

TO: Honorable Mayor and Members of the City Council
FROM: Annie Young, CPFO, Director of Management Services
SUBJECT: Residential Rehabilitation Program Loan Request (Severo and Maria Jimenez / 1119 Knoll Drive, Monterey Park, CA 91754)

RECOMMENDATION:

It is recommended that the City Council:

1. Approving a Residential Rehabilitation Program Loan of not to exceed \$140,000; and
2. Authorizing the City Manager to execute all necessary loan documents; and
3. Take such additional, related, action that may be desirable

EXECUTIVE SUMMARY:

In December 2018, Severo and Maria Jimenez ("Applicants") applied for assistance through the City's Residential Rehabilitation Loan Program (Program) for repairs to their home located at 1119 Knoll Drive, Monterey Park CA 92754. An initial inspection was performed and permits were reviewed. Based upon the initial inspection and review of permits, an informal geotechnical investigation was requested. The geotechnical investigation indicates that the integrity of the foundation has been compromised due to the additional weight of a permitted, second story addition constructed approximately 20 years ago.

Based on the estimate from the geotechnical firm, the stabilization of the foundation will cost between \$80,000 and \$110,000. The exact cost is unknown and can only be determined with geotechnical report. An additional estimated \$30,000 is needed for repairs to the house (roof, plumbing, sewer, flooring, windows).

In the last several months, the Applicants have experienced sewer and water line breakage and cracking of the exterior walls. According to the geotechnical firm, these issues are the direct result of the compromised foundation and the structure will continue to shift down slope unless the foundation is stabilized. Photographs of the residence are attached for reference.

The Applicants are requesting City Council consideration of the approval of a loan of up to \$140,000 to address foundation stabilization repairs and limited interior and exterior improvements resulting from the foundation movement such as roof replacement, plumbing and sewer line repairs/replacement and wall and flooring repairs. The household is comprised of two-persons that are husband and wife that meet all program eligibility criteria including but not limited to: (1) live in the property; (2) are extremely low-income; (2) have sufficient equity to cover the City loan (approximately \$450,000); and (3) are current on their property taxes and mortgage payment.

DISCUSSION:

The City of Monterey Park ("City") has provided a Residential Rehabilitation Program ("Program") to the community for over two decades using its federal HOME Program funds. The Program is designed to provide funding to eligible low-and moderate-income homeowners to cover the cost of necessary housing repairs; for the preservation of decent, safe, and sanitary housing; to correct hazardous structural conditions and to correct building and health code violations. The goal of the Program is to assist eligible low- and moderate-income residential owner-occupants in maintaining the City's existing housing stock by means of home rehabilitation.

In 2017, the City Council approved the current Residential Rehabilitation Program Guidelines to ensure the timely expenditure of its HOME funds and create a more attractive program assistance to its residents. The Program provides for zero interest loans of up to \$75,000.00. The loan is 100% repayable when the property sells, transfers ownership, the owner ceases to reside in the property or in 30 years whichever comes first. Grants are only available for the abatement of lead-based paint and/or mold and the payment of soft loan costs such as title reports, permits, inspections, and engineering costs.

The Program Guidelines limits the City Manager's approval of a loan of up to \$75,000. Therefore, at this time, staff is requesting consideration of City Council approval of a loan not to exceed \$140,000. In keeping with the Program Guidelines, three bids will be solicited from qualified engineering and geotechnical firms to ensure the selection of the lowest, responsible bidder.

FISCAL IMPACT:

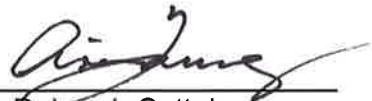
The City receives an annual allocation of HOME funds from HUD for the operation of the City's Home Program. As of today, the City holds in excess of \$800,000 in Home funds for the operation of the Home Program. This loan request is 100% covered by the Home funds and there is no impact to the General Fund.

Respectfully submitted:



Annie Yaung, CPFO
Director of Management Services

Prepared By:

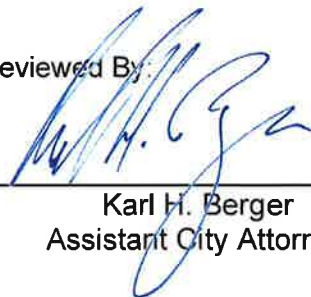

for _____
Deborah Sottek
Housing Consultant

Approved By:



Ron Bow
City Manager

Reviewed By:



Karl H. Berger
Assistant City Attorney

ATTACHMENT:

- 1) Photographs

ATTACHMENT 1

Photographs

1 - FRONT OF HOUSE	2 - RIGHT SIDE HOUSE	3 - STUCCO CRACKING – RIGHT SIDE HOUSE
		
4 - STUCCO CRACKING – LEFT SIDE HOUSE	5 - HOUSE MOVING AWAY FROM WALKWAY	6 - WALKWAY MOVEMENT
		
7 - STUCCO CRACKING	8 - STUCCO REPAIRS	
		



City Council Staff Report

DATE: May 15, 2019

AGENDA ITEM NO: New Business
Agenda Item 5-B

TO: The Honorable Mayor and City Council
FROM: Mark A. McAvoy, Director of Public Works/City Engineer
SUBJECT: Award of Spirit Bus Contract

RECOMMENDATION:

It is recommended that the City Council consider:

1. Authorizing the City Manager to execute a contract, in a form approved by the City Attorney, with Transportation Concepts for operating the City's Spirit Bus transportation program; and
2. Take such additional, related, action that may be desirable.

CEQA:

Taking the recommended action would not result in a potential for resulting in a direct or reasonably indirect physical change in the environment and, accordingly, does not qualify as a "project" under the California Environmental Quality Act (Cal. Pub. Res. Code §§ 21000, *et seq.*; "CEQA") or CEQA regulations (Cal. Code Regs. tit. 14, §§ 15000, *et seq.*; see Cal. Code Regs. tit. 14, §§ 15061(b)(3), 15378). Even if the award of contract were to qualify as a project, it would be categorically exempt as a Class 1 or Class 5 project since, at best, it would constitute a minor alteration of existing public structures involving no expansion of use; or a minor alteration in land use limitations (see Cal. Code Regs. tit. 14, §§ 15301, 15305).

EXECUTIVE SUMMARY:

At the March 20, 2019 Council meeting, the City Council directed staff to release a Request for Proposals (RFP) on March 21, 2019 for the operation and maintenance of the City's fixed-route system, Spirit Bus. Two companies submitted proposals. Staff recommends the City Council award the contract to Transportation Concepts, who submitted a qualified proposal with the lowest cost.

BACKGROUND:

The City's current contract with First Transit to operate and maintain the Spirit Bus expires on June 30, 2019. Staff released a RFP on March 21, 2019 for a new contract. The RFP notice was sent to over 20 vendors that provide transportation services in the region. The RFP submission deadline was May 1, 2019.

Two companies submitted proposals: First Transit and Transportation Concepts. A Selection Committee was formed, comprised of four staff members from the Department of Public Works. The committee reviewed proposals to achieve a thorough understanding of each proposal with the following criteria:

A. Staffing / Personnel Program	35%
B. Price	20%
C. Financial Viability of Contractor	10%
D. Experience / Technical Competence / Vehicles	35%
Total	100%

Pursuant to Labor Code Section 1072, it requires public agencies to provide a 10% bidding preference to service contractors only if contractors expressly state that they will retain employees of the prior contractor for at least 90 days in their respective written bids. Both proposers did not state in their proposals that they would retain the employees of current contractor *for at least 90 days* although Transportation Concepts stated in its proposal that “[it] will offer to retain all of the existing employees of the prior contractor.” The Request for Proposal states this:

“If the proposer is a transit company seeking to replace an existing transit company, an additional 10% will be added to this score if the proposer retains employees of the existing transit company per Labor Code § 1072. In order for ANY proposer to qualify for the 10% credit, it must provide an affirmative statement in their bid declaring whether or not they commit to retaining the employees.” (Emphasis in RFP; pp.30-31).

The statement made by Transportation Concepts does not commit it to *actually* retaining employees for 90 days, it only states that it will “offer to retain” such employees. Since neither proposer made the affirmative statement in accordance with Labor Code § 1072, neither company was provided with a 10% benefit.

Both these companies previously contracted with the City to operate and maintain the Spirit Bus system. First Transit is currently operating the Spirit Bus, having done so from July 2015 to present, as well as from July 2004 to June 2010. Transportation Concepts operated the Spirit Bus from July 2001 to June 2004. Both companies have had similar results regarding issues including passenger complaints, on-time performance, and vehicle breakdown. Both companies propose a project manager who oversees other contracts, thereby not charged 100% to the City’s contract.

The biggest challenge for transportation service contractors is maintaining a reliable fleet of buses. In this regard, both companies have had similar results for the City in the past. For instance, staff sent a formal notice to First Transit in 2007 warning that the contract would be terminated due to poor performance that was related to vehicle maintenance. Transportation Concepts also had issues with vehicle maintenance and admitted that it had underestimated the cost for repairs in its proposal to the City in

2001. As a result, it did not exercise the option to extend its contract for another two years, and its contract terminated after its third year in 2004.

When one or more Spirit buses break down, a spare bus will be dispatched to continue the service. Transportation Concepts proposes to purchase a new 30-seat 2019 CNG Starcraft Allstar transit bus as a spare to existing fleet and one additional support sedan for driver relief and one sedan for field supervision. While First Transit does not specify the model of the spared bus in its proposal, it would dispatch spared transit buses that meet the same standard of safety and cleanliness from its headquarters located in El Monte.

To improve customer service and better security on the Spirit buses, the proposal requires the contractor to purchase and install vehicle cameras on the entire Spirit Bus fleet. First Transit proposes the implementation of DriveCam system for video and audio monitoring of buses and the installation of DoubleMap technology with a customer-facing app for real-time vehicle tracking for both riders and administrators. Similarly, Transportation Concepts proposes to install a REI Buswatch Camera system, as well as the purchase and installation of an Annunciator system and Hanover LED signs so that users within the community can have real-time accessibility for on-time performance along every bus stop.

To ensure that the contractor is accountable to performance standards, strict liquidated damages are included to the proposed Spirit Bus Agreement. The intent of the liquidated damages is to reimburse the City for damages resulting from the contractor failing to address problems that may result from inadequate staffing or resources that were proposed for the City's contract.

A summary of the two companies' cost proposals is provided in the following table:

Hourly Rate Components	First Transit	Transportation Concepts
Operating Costs*	\$658,772	\$499,760
Administrative Costs*	\$56,729	\$77,280
Maintenance Costs*	\$247,972	\$73,174
Maintenance/Operating Facilities	\$16,445	\$157,677
Insurance	\$55,694	\$44,362
City and Other Fees/Taxes	\$2,900	\$43,695
Capital Costs	\$43,213	\$24,794
Start-Up Costs	---	\$11,227
Profit	\$45,072	\$38,832
Other Costs	---	---
Total	\$1,126,797	\$970,801
Vehicle Revenue Hours	19,000	19,000
Hourly Rate	\$59.31	\$51.10

*Direct labor costs include benefits.

Transportation Concepts proposed the lowest cost at \$51.10 per hour. Its proposed annual cost is \$155,996 less than the next lowest bid due to lower projected operating costs and smaller profit margin. The two companies propose similar projected maintenance and operating facilities costs. Transportation Concepts has a maintenance partnership with Penske and therefore it proposes to store and maintain the Spirit Bus vehicles at the Penske Fleet Maintenance Facility located at 1500 S. Greenwood Avenue in Montebello. Penske will provide 22 full-time mechanics at the facility.

Separately, the two companies provided the following rates for specialized services:

Charter Service Hourly Rate (As Needed)	First Transit	Transportation Concepts
Based on 200 hours (estimated)	\$51.34	\$56.00

While the hourly rate offered by Transportation Concepts is higher for the specialized services, its base bid is lower for all other day-to-day services. These charter services would only be retained on an “as-needed” basis.

For operations oversight, First Transit proposes a staffing level of 17 full-time and eight part-time employees while Transportation Concepts proposes 14 full-time and four part-time employees to work for this contract. However, Transportation Concepts indicates similar number of hours (6,760 hours) as First Transit (6,694 hours) in supervisory staff time to manage its drivers and fleet maintenance.

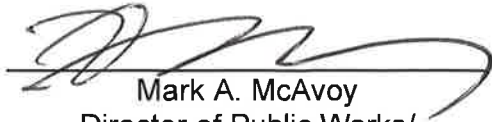
First Transit is the incumbent contractor. Transportation Concepts proposes to facilitate the transition of contract immediately upon contract award, and a transition plan is detailed in the attached proposal. It should also be noted, that the current proposal also allows the City to terminate the contract with a 30-day cancellation notice should the City choose to move forward with a mobility program at some point that alters the operation of the Spirit Bus system.

FISCAL IMPACT:

First Transit’s current contract with the City provides for an hourly rate of \$43.99 or an annual cost of \$835,810 (based on the calculation of an average of 19,000 revenue hours per year). A new contract with Transportation Concepts would increase the Spirit Bus contract costs by an estimated \$134,991.

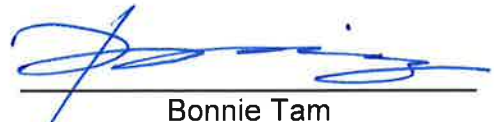
The Spirit Bus system is subsidized by the City’s Proposition A and Proposition C Local Returns funds. The FY 2018-19 Adopted Budget includes \$264,806 in Proposition A funds and \$617,463 in Proposition C funds for a total of \$882,269 in budget appropriation for the annual Spirit Bus contract and unforeseen vehicle repair expenses for older bus fleet.

Respectfully submitted by:



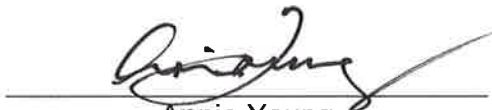
Mark A. McAvoy
Director of Public Works/
City Engineer

Prepared by:



Bonnie Tam
Principal Management Analyst

Approved by:



Annie Yaung
Director of Management Services

Approved by:



Ron Bow
City Manager

Reviewed by:



Karl H. Berger
Assistant City Attorney

ATTACHMENTS:

1. Spirit Bus Operations and Maintenance Agreement
2. First Transit Cost Proposal
3. Transportation Concepts Cost Proposal

ATTACHMENT 1

Spirit Bus Operations and Maintenance Agreement

TRANSIT AGREEMENT FOR FIXED ROUTE TRANSIT SERVICE

This Agreement is made as of this ____ day of ____ by and between the City of Monterey Park ("City"), a municipal corporation and general law city, and Parking Concepts, Inc., dba Transportation Concepts, a California corporation ("Contractor").

This Agreement is entered into with reference to the following:

A. The City invited proposals for operations and maintenance of heavy-duty mid-sized transit vehicles pursuant to a Request for Proposal ("RFP") dated March 21, 2019. The RFP is attached as Exhibit "A," and incorporated by reference.

B. Contractor submitted a proposal ("Contractor's Proposal") for fixed route transit service dated May 1, 2019. The Contractor's Proposal and addendum are attached as Exhibit "B," and incorporated by reference.

C. The City Council awarded this Agreement to the Contractor on May 15, 2019.

D. City and Contractor agree as follows:

(1) **Commencement and Term of Agreement.** The term of this Agreement, and Contractor's performance, begins July 1, 2019 and ends June 30, 2023, unless earlier terminated as provided in this Agreement.

At least six (6) months before June 30, 2023, Contractor must provide written notice to City of its interest to extend this Agreement up to two (2) additional two (2) year increments. Upon receipt, the City may, in its sole discretion, extend this Agreement for additional time, up to two (2) years, beyond the initial term. The Contractor Fee for additional time is provided in Sections (12) and (13).

(2) **Scope of Work.** Contractor must perform all work necessary to provide fixed route transit service using City owned transit vehicles as provided for in the RFP, the Contractor's Proposal and this Agreement (collectively, the "Agreement"). Whenever either the RFP, Contractor's Proposal, or this Agreement conflicts, or a particular task or service is described in a more limited or different manner, then the document requiring a greater obligation or burden upon the Contractor applies, as determined by City.

Prior to the commencement of the Contractor's responsibilities under the Contract, City will authorize a third party vehicle inspector that is acceptable to the Contractor to inspect all City vehicles and equipment covered in the Agreement and shall verify that all vehicles and equipment are in safe operating condition and good running order. The vehicle maintenance inspector will compile a master list of all findings that include, but not limited to, the results of the sample oil testing and inspection of diesel particulate filter equipment. If repairs/maintenance identified in the vehicle inspector's master list are not completed by the commencement of the Contract, the City will arrange for these repairs at City's expense through a third party vehicle maintenance provider that is acceptable to the Contractor.

(3) Modifications to Service. City may modify transit service provided by Contractor, including, without limitation, adding or deleting transit stops, extending, deleting or adding routes, and expanding or decreasing service hours and/or days.

The City may increase or reduce annual revenue vehicle hours at the vehicle revenue hour rates set forth in Section (12) of this Agreement. City must provide Contractor at least 10 days written notice of such modification. Where such increases or reductions impact by greater than 20% the service levels under the assumed routes, schedules, days of service, hours or miles contained in the RFP, Contractor shall be permitted to adjust rates commensurately to cover increases or decreases in cost structure associated with such changes by the City. No adjustment other than to the rate change for such modified hours may be made on account of such modification.

(4) Emergency Service. At the request of City, Contractor must deliver operational City transit vehicles to designated locations for emergency use as directed by City.

(5) Personnel

(a) Contractor's key personnel to perform the Project Work must be those listed in Contractor's Proposal. Contractor represents, warrants and agrees that all personnel used for the Project Work must be under its direct supervision and control and be fully qualified and appropriately credentialed. Contractors' personnel must perform their duties and obligations in a professional and competent manner. City may demand a change in personnel if City, in its opinion, determines that such personnel is not performing to satisfactory standards.

(b) All drivers and operational personnel performing transit service work under this Agreement must be recruited, hired, and trained by Contractor pursuant to the standards set forth in the RFP and Contractor's Proposal.

(6) Nondiscrimination.

(a) In providing for the performance of the Project Work, Contractor cannot discriminate against any employee or applicant for employment on the basis of race, religion, color, sex, age or national origin and must comply with all applicable laws and ordinances.

(b) Contractor will not discriminate and will take affirmative action to ensure that employees are not discriminated against on the basis of race, color, religion, political belief, marital status, age, national origin, sex or handicap not limiting the ability of the person to perform the job contemplated. Such action will include, without limitation, the following: employment, upgrading, demotion, or transfer; recruitment, or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection or training, including apprenticeship. Such action must comply with Executive Order 11246 amended by Executive Order 11375 and as supplemented in Department of Labor regulations (41 CFR, Part 60).

(7) Risk Management/Safety. Contractor must perform all services as set forth in Contractor's Proposal for risk management and safety.

(8) Insurance. Contractor must procure and maintain, for the duration of the Agreement, insurance against claims for injuries to persons or damages to property, which may arise from or

in connection with Contractor's performance. The cost of such insurance is borne by Contractor. City may terminate this Agreement for Contractor's failure to procure and/or maintain the proper insurance.

(a) Before commencing performance under this Agreement, and at all other times this Agreement is effective, Contractor will procure and maintain the following types of insurance with coverage limits complying, at a minimum, with the limits set forth below:

Type of Insurance	Limits
Commercial general liability:	\$20,000,000
Business automobile liability	\$20,000,000
Workers compensation	Statutory requirement

(b) Commercial general liability insurance will meet or exceed the requirements of the most recent ISO-CGL Form, or equivalent. The amount of insurance set forth above will be a combined single limit per occurrence for bodily injury, personal injury, and property damage for the policy coverage. Liability policies will be endorsed to name City, its officials, and employees as "additional insureds" under said insurance coverage and to state that such insurance will be deemed "primary" such that any other insurance that may be carried by City will be excess thereto. Such insurance will be on an "occurrence," not a "claims made," basis and will not be cancelable or subject to reduction except upon thirty (30) days prior written notice to City.

(c) Automobile coverage will be written on ISO Business Auto Coverage Form CA 00 01 06 92, including symbol 1 (Any Auto).

(d) Contractor will furnish to City duly authenticated Certificates of Insurance evidencing maintenance of the insurance required under this Agreement and such other evidence of insurance or copies of policies as may be reasonably required by City from time to time. Insurance must be placed with insurers with a current A.M. Best Company Rating equivalent to at least a Rating of "A:VII."

(e) Should Contractor, for any reason, fail to obtain and maintain the insurance required by this Agreement, City may obtain such coverage at Contractor's expense and deduct the cost of such insurance from payments due to Contractor under this Agreement or terminate.

(f) All Coverages. Each insurance policy required by this clause must be endorsed to state that coverage cannot be cancelled except after thirty (30) days prior written notice by mail has been given to City, or ten (10) days' notice if cancellation is due to nonpayment of a premium.

(9) **Performance Bond.** Upon execution of this Agreement, Contractor must procure at its expense and post with City an unconditional performance bond in the amount of One Hundred Thousand Dollars (\$100,000) in favor of City and executed by a corporate surety authorized to conduct business as a surety in the State of California. Said performance bond

must ensure the faithful performance by Contractor of the terms and conditions of this Agreement. Said performance bond must remain in full force and effect for the term of this Agreement. The City can call upon the performance bond upon termination of this Agreement “for cause” as defined in Section (24).

(10) License Fees, Taxes, and Permits. Contractor has the sole obligation to pay any license fees, assessments and taxes, including, without limitation, use, sales, property or other taxes, plus applicable penalties and interest which may be imposed upon Contractor by any governmental agency as a result of the operation of the equipment that is the subject of this Agreement. The City has the sole obligation to pay any fees associated with vehicle registration, licensing, and permits.

(11) Liquidated Damages.

(a) The parties agree that failure of Contractor to meet the standards set forth in Section R of the attached Exhibit “A” in the Scope of Work, which is incorporated by reference, constitutes a breach of this Agreement. The parties agree that this breach will result in damage and injury to City. The parties further agree, however, that actual damages incurred by City as result of such breach is difficult if not impossible to ascertain with any degree of certainty or accuracy. Accordingly, the parties have negotiated and have agreed that Contractor is liable to City, and must pay, for liquidated damages, and not as a penalty, the amounts in Section R of the Scope of Work in Exhibit “A.” Failure to cure this breach may result in City terminating this agreement and executing the performance bond.

(b) Contractor must commence service on July 1, 2015. The parties agree that failure of Contractor to meet this standard constitutes a default of this Agreement. The parties agree that this default will result in damage and injury to City. The parties further agree, however, that actual damages incurred by City as result of such default is difficult if not impossible to ascertain with any degree of certainty or accuracy. Accordingly, the parties have negotiated and have agreed that Contractor is liable to, and must pay, City for liquidated damages, and not as a penalty, \$2,000.00 for each service day the Contractor fails to commence service up to 30 days. If City determines that the Contractor has been delayed in commencing service due to causes beyond its control and without the fault or negligence of the Contractor, City may extend the time for commencing service. Any request for an extension must be in writing to City and agreed to before the commencement date. The decision to grant and the length of the extension is at City’s sole discretion. Should Contractor be unable to commence service 30 days after the commencement date, Contractor forfeits to City the \$100,000.00 performance bond for failure to perform.

(c) City may withhold from any moneys payable on account of services performed by Contractor any accrued liquidated damages.

(d) The City must notify the Contractor of penalties assessed within thirty (30) days so that the Contractor has the opportunity to investigate the matter in order to either correct the cause of the penalty(ies) or to establish the Contractor is not responsible or did not cause the delay/occurrence. If the Authority fails to alert the Contractor within thirty (30) days of any penalties, the penalties will be waived. Additionally, liquidated damages shall not be assessed for any reason during the first month of the initial term. Liquidated damages shall not be assessed at

any time during the term when such delays or failures are due to weather, road construction or traffic delays beyond the control of contractor. For the first three months of the Contract, liquidated damages shall not be assessed for any reason associated with pending vehicle maintenance/repairs that were identified in the vehicle inspector's master list.

(12) Contractor Fee. For services rendered by Contractor under this Agreement, City agrees to pay Contractor the sum of \$42.08 per revenue vehicle service hour as awarded by City Council. A revenue vehicle service hour is defined as every hour or fraction of an hour that a transit vehicle is operating from the first passenger pickup point to the last passenger delivery point as designated by the City. Deadheading and storage does not constitute vehicle service.

(13) Annual Adjustment for CPI. Beginning July 1, 2020 and each July 1st thereafter, the rate for regular service hours, maximum cumulative payment, the rate for additional vehicle service hours and additional cumulative payment will be increased on a percentage basis using the percentage increase in the consumer price index ("CPI") for all urban consumers as calculated by the United States Department of Labor, Bureau of Labor Statistics, for the Los Angeles –Riverside-Orange County area, all items, subject to a maximum annual adjustment of three and a half percent (3½%). Notwithstanding the Los Angeles-Riverside-Orange County Consumer Price Index, the rates will not fall below the rates provided in Section (12).

(14) Payment. Contractor must invoice City on a monthly basis for services rendered. Each invoice must include a monthly report in a format (and with information) approved by City. City must pay Contractor monthly and within a reasonable time from receipt of invoice, consistent with City's normal accounts payable practices and procedures. Under normal circumstances, Contractor will receive payment within 30 days of invoice.

(15) Indemnification. Contractor indemnifies and holds City harmless from and against any claim, action, damages, costs (including, without limitation, attorney's fees), injuries, or liability, directly arising out of this Agreement, or its performance, except for such loss or damage arising from City's sole negligence or willful misconduct. Should City be named in any suit, or should any claim be brought against it by suit or otherwise, whether the same be groundless or not, arising directly out of this Agreement, or its performance, Contractor will defend City (at City's written request and with counsel reasonably satisfactory to City) and will indemnify City for any judgment rendered against it or any sums paid out in settlement or otherwise.

(a) For purposes of this section "City" includes City's officers, officials, employees, and representatives.

(b) It is expressly understood and agreed that the foregoing provisions will survive termination of this Agreement.

(c) The requirements as to the types and limits of insurance coverage to be maintained by Contractor as required by this Agreement, and any approval of said insurance by City, are not intended to and will not in any manner limit or qualify the liabilities and obligations otherwise assumed by Contractor pursuant to this Agreement, including, without limitation, to the provisions concerning indemnification.

(d) The Contractor acknowledges that it has fully informed itself of the contents and meaning of this hold harmless agreement, and has so executed it with full knowledge thereof, and that the terms are contractual and not a mere recital. These requirements also apply to any subcontractor whose hazards are not covered by the Contractor's insurance policies.

(16) Conflict of Interest/Undue Influence/Indemnification.

(a) No official, officer or employee of City can have any financial interest, direct or indirect, in this Agreement or the proceeds thereof during his/her tenure with City or for period of one year thereafter. Contractor affirms that there exists no actual or potential financial interest between the Contractor's receipt of proceeds for the work to be performed in connection with the Project Work under this Agreement and any official, officer or employee of City.

(b) Contractor declares and warrants that no undue influence or pressure was or will be used against or in concert with any official, officer or employee of City in connection with the award, terms or implementation of this Agreement, including any method of coercion, confidential financial arrangement, or financial inducement. No official, officer or employee of City can receive compensation, directly or indirectly, from Contractor, or from any officer, employee or agent of Contractor, in connection with the award of this Agreement or any work to be conducted as a result of this Agreement. Violation of this Section is a material breach of this Agreement entitling City to any and all remedies at law or in equity.

(c) Contractor agrees to indemnify, defend and hold harmless City, its officials, officers, attorneys and employees from and against any and all claims, losses and liabilities, lawsuits, demands, actions, damages and costs of any type, including without limitation costs of suit and attorneys fees, relating directly to, or arising out of or in connection with any claim, proceeding, lawsuits or actions, whether judicial or administrative, related to any alleged breach of this section, or violation of Government Code §§ 1090, *et seq.*, the California Political Reform Act (Government Code §§ 87100, *et seq.*), or any conflict of interest law or regulation.

(17) Successors/Assigns. This Agreement covers general services of a specific and unique nature and Contractor can neither assign any rights nor delegate any duties under this Agreement without City's prior written consent which may be withheld at City's sole discretion. The parties understand and agree that by entering into this Agreement, Contractor is not the sole or exclusive contractor for fixed route transit service in City. City may enter into other contracts for fixed route transit service or bus service in City during the duration of this Agreement or any extension thereto.

(18) Force Majeure. Contractor is excused from performing obligations under this Agreement during the time and to the extent that it is prevented from performing by cause beyond its control, including, without limitation: any incident of fire, flood or strike, commandeering of material, products, plants or facilities by the federal, state or local government; terrorist acts; riots, strikes, war, or civil disorder; unavailability of fuel.

(19) Amendments. The provisions of this Agreement cannot be amended or altered except by a written instrument fully executed by each of the parties. This Agreement embodies the entire understanding between the parties and supersedes any prior written or oral agreements or understandings not incorporated herein.

(20) **Authority.** Each person executing this Agreement on behalf of Contractor represents and warrants (i) his authority to do so on behalf of Contractor, and (ii) that such authority has been duly and validly conferred by Contractor's board of directors.

(21) **No Waiver.** City's failure to enforce any provision of this Agreement with respect to a default hereunder does not constitute a waiver of City's right to enforce any other term or provision of this Agreement. The waiver of City of any default under any term or provision of this Agreement cannot be deemed to be a waiver of any other term or provision hereof or any subsequent default, whether of the same or any other term or provision of this Agreement.

(22) **Agency/Independent Contractor.** Except as City may specify in writing, Contractor does not have authority, express or implied, to act on behalf of City in any capacity whatsoever, as an agent. Contractor does not have authority, express or implied, pursuant to this Agreement to bind City to any obligation whatsoever. Contractor and all of its employees are independent contractors and not employees of City.

(23) **Notices.** Any notice must be given by either personal delivery, or by registered or certified first class United States mail, U.S. Postal Service's Express Mail or Federal Express, and shall be deemed received upon two (2) days after mailing. In each case postage must be prepaid and return receipt shall be requested, addressed as follows:

Contractor: Transportaion Concepts
 12 Mauchly Building I
 Irvine, CA 92618

City: Mark A. McAvoy
 Director of Public Works/City Engineer
 City of Monterey Park
 320 West Newmark Avenue
 Monterey Park, CA 91754

(24) Termination of Agreement

(a) The City may terminate this Agreement with or without cause at City's sole discretion at any time. City may terminate this Agreement upon thirty (30) days written notice for cause including, without limitation:

(1) Bankruptcy of the Contractor or assignment by it for the benefit of its creditors.

(2) Failure or refusal of the Contractor to correct or perform a service specified herein within 5 working days after the second written warning for the same offense.

(3) Failure or refusal of the Contractor to comply with the instructions of City or with applicable Federal, State and local governing laws or code. Contractor is to be particularly aware of the State of California Administrative Code, Title 13, Motor Vehicles, published by State of California, Office of Administrative Procedure, Department of General Services.

(4) Failure of the Contractor to notify City within twenty-four (24) hours if it has received an “Unsatisfactory” rating by California Highway Patrol Motor Carrier Safety inspectors or City Police Department, or failure of the Contractor to provide evidence to City within thirty (30) days of receiving such an “unsatisfactory rating” that its maintenance facilities and fleet have been re-inspected and have received a “Satisfactory” rating. Either such failure may result in forfeiture of the \$100,000 performance bond and/or may be cause for termination of this Agreement.

(5) Cease of operation for more than 48 hours without prior City approval.

(b) Failure by the Contractor to perform any of its obligations does not constitute a breach of this Agreement if such failure is excused pursuant to this Agreement. Notwithstanding the foregoing, if Contractor fails to perform within thirty (30) days, City has the right to terminate this Agreement upon five (5) days written notice. Such termination is considered “for cause,” and Contractor may not claim any damages against City for the termination action.

(c) City reserves the right to withhold payment to the Contractor, suspend the Agreement, and/or provide substitute service with all charges in excess of contract rates therefore to be paid by the Contractor in the event the Contractor fails to meet any of the specifications with regard to vehicle or service quality as described pursuant to this Agreement, until such time as City determines that the Contractor has satisfactorily corrected any such deficiencies. Such suspension is considered “for cause,” and the Contractor may not claim any damages against City for such suspension action.

(25) Applicable Law and Venue. The law of the State of California applies to the interpretation and enforcement of this Agreement. Pending final resolution of a dispute hereunder, the Contractor must proceed diligently with the performance of this Agreement and in accordance with City’s decision. Venue for any dispute is Los Angeles County Superior Court.

(26) Construction. It is deemed that this Agreement was prepared by the parties jointly and equally, and cannot be interpreted against either party on the grounds that the party prepared the Agreement or caused it to be prepared. Both City and Contractor were represented by legal counsel and have had equal opportunity to review and revise the terms and form of this Agreement before execution of this Agreement.

(27) Taxpayer Identification Number. Contractor will provide City with a Taxpayer Identification Number.

(28) Waiver. A waiver by City of any breach of any term, covenant, or condition contained in this Agreement will not be deemed to be a waiver of any subsequent breach of the same or any other term, covenant, or condition contained in this Agreement, whether of the same or different character.

(29) Severable. If any portion of this Agreement is declared by a court of competent jurisdiction to be invalid or unenforceable, then such portion will be deemed modified to the extent necessary in the opinion of the court to render such portion enforceable and, as so modified, such portion and the balance of this Agreement will continue in full force and effect.

(30) Non-Appropriation of Funds. Payments due and payable to Contractor for current services are within the current budget and within an available, unexhausted and unencumbered appropriation of City. In the event City has not appropriated sufficient funds for payment of Contractor services beyond the current fiscal year, this Agreement will cover only those costs incurred up to the conclusion of the current fiscal year.

IN WITNESS WHEREOF, the parties have executed this Agreement on the date first written above.

CITY OF MONTEREY PARK

TRANSPORTATION CONCEPTS

By: _____
Ron Bow
City Manager

By: _____

Print Name: _____

Title: _____

ATTEST:

City Clerk

By: _____

Print Name: _____

Title: _____

APPROVED AS TO FORM:
Mark. D. Hensley, City Attorney

By: _____
Karl H. Berger, Assistant City Attorney

ATTACHMENT 2

First Transit Cost Proposal



ORIGINAL



The City of Monterey Park
Proposal to Provide Fixed Route Transportation Services
May 2019





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Organization	First Transit, Inc.		
Services	Transit Contracting, Transit Management, Transit Consulting		
Year Founded	1955		
Contact	Maureen Gibboney Business Development Manager 600 Vine St., Suite 1400 Cincinnati, OH 45202 P: (513) 205-2762 Maureen.Gibboney@firstgroup.com	Justin Pate SVP Global Business Development and Marketing 600 Vine St., Suite 1400 Cincinnati, OH 45202 P: (214) 662-0499 Justin.Pate@firstgroup.com	
Form of Business	Corporation	Incorporation	Delaware in 1969
Number of Employees	Employs more than 19,500; Manages 4,000 employees		
Federal I.D. Number	23 - 1716119		
US DOT	102211	Motor Carrier	MC - 576222
Officers	Brad Thomas, President Jim Tippen, SVP of Finance Michael Petrucci, VP General Counsel	Christina Cahall, Asst. Treasurer Brian Beechem, Asst. Secretary Christa McAndrew Asst. Secretary Nancy Eliason, Asst. Secretary	
Regional Location Contact	Jay Jeter 25 Merrill Circle Moraga, CA 94556 P: (510) 282-2901 Jay.Jeter@firstgroup.com		
Home Office	First Transit, Inc. 600 Vine St., Suite 1400 Cincinnati, OH 45202		



First Transit, Inc.
600 Vine Street, Suite 1400
Cincinnati, OH 45202
Phone: 513-241-2200
Fax: 513-684-8852

April 29, 2019

City of Monterey Park

Attention: Mark McAvoy, Director of Public Works

320 W. Newmark Ave.

Monterey Park, CA 91754

Re: Request for Proposal (RFP) To Provide Local Fixed Route Transportation Services

Dear Mr. McAvoy,

First Transit is pleased to have the opportunity to participate in the City of Monterey Park's current procurement for local fixed route transportation services. As the successful provider of these services for Monterey Park for a combined 10 years, no one understands these services, your expectations, and our shared customers like First Transit. If selected to continue as your transportation provider, we will provide at a fair price the high-quality transportation services you expect. Although we are proud of the accomplishments our partnership has seen, we will work continuously to improve our service delivery to Monterey Park utilizing our refreshed management team, equipped with new tools and technologies, dedicated to Monterey Park's success.

First Transit is proud of all our over 335 locations across North America. With more than 60 years of transportation operations and management experience, we stand on our record of performance and commitment to safety and quality. First Transit understands the unique and complex nature of Monterey Park's transit operations. First Transit is experienced in the successful management and operation of transit operations in various communities throughout North America and the United Kingdom, with extensive experience in fixed route services, and in California, specifically.

Monterey Park's transportation services, through the management and operations provided by First Transit, will continue to offer high-quality, safe, and reliable transportation to its ridership while economically and efficiently providing value to the City.

Monterey Park will benefit from the selection of First Transit and our enhanced services:

- A truly seamless transition with no disruption in service to Spirit Bus and our ridership
- Knowledgeable, experienced management team who knows the service, the community, and our shared customers
- Our contracted services are known for low driver turnover, and we will continue to select customer-oriented operators, offering a respectful, fair, and quality work environment

- Our comprehensive safety programs and training processes provide professional training for operators that will lead to delivery of safe, customer-oriented services
- The power of our national network of managers and transportation professionals, providing instant information sharing on a variety of transit matters
- Our company's recognition for safety and quality operations awarded by APTA and the National Safety Council
- Value-added technologies, including DriveCam SF64 for driver monitoring and customized training opportunities and DoubleMap for AVL and a customer-facing app

We acknowledge the following:

- The receipt of Addendum No. 1, issued 4/19/19
- This proposal is binding for 120 days from due date of 5/1/19
- We take no exceptions to the draft contract

We are extremely excited about the possibility of strengthening our partnership with Monterey Park with a new contract for these important transportation services. Please note that our pricing proposal reflects increases that include:

- Wages that incorporate considerations for low unemployment, continually increasing minimum wage rates as mandated by the California minimum wage requirements and the necessity to recruit in the highly competitive LA labor market. As the incumbent provider, we understand the levels needed to ensure our ability to provide the high level of service you expect, attracting and retaining safe, experienced, customer-focused operators
- Booming real-estate market in which facility and associated costs are steadily increasing
- Enhancements in the new contract that will result in meaningful benefits to our shared customers

Should you have questions concerning any aspect of our proposal, or wish to schedule a meeting to discuss the ability of First Transit and our management team to continue to successfully operate your transportation services, please feel free to contact Maury Gibboney, Business Development Manager, at (513) 205-2762, maureen.gibboney@firstgroup.com. We look forward to discussing our proposal with you.

Sincerely,



Bradley A. Thomas

President

First Transit, Inc.

CHECKLIST OF REQUIRED PROPOSAL MATERIALS

- ☒ Cover Sheet
- ☒ Letter of Transmittal
- ☒ 1 original and 3 bound copies of proposal (clearly marked as required)
- ☒ Acknowledgement of Addenda, if any
- ☒ Statement that proposal is binding for 120 days from due date
- ☒ Proof of Registry (good standing) with California Secretary of State
- ☒ Proof of Participation – California DMV Pull Notice Program
- ☒ Proof of CHP Certification
- ☒ Project Understanding
- ☒ Experience and References
- ☒ Start-Up Plan
 - ☒ Implementation Schedule
 - ☒ Facilities Location
- ☒ Administration Plan
- ☒ Operations Plan
- ☒ Maintenance Plan
- ☒ Insurance Adequacy
 - ☒ Wavier of Subrogation/signed endorsement
 - ☒ Signed endorsement for Primary Insurance
 - ☒ City listed as additional insured on all policies
- ☒ Financial Information
- ☒ Price Proposal Spreadsheet (Provide an electronic version of the Cost Proposal in Excel)
- ☒ Exceptions to draft contract, if any

FORM A
SUBMITTAL COVER PAGE

City of Monterey Park Fixed Route Transit
Services

Bidder's Company Name First Transit, Inc.
Legal Structure (corp./partner/proprietor) Corporation
Principal Office Address 600 Vine St., Suite 1400
City, St, Zip Cincinnati, OH, 45202
Federal Employer Identification Number 23-1716119

I certify that this Proposer is sufficiently informed as to all matters affecting the performance of the work, and the furnishing of labor, supplies, material or equipment called for in this proposal; that the proposal has been checked for errors and omissions; and that the facts stated in the proposal are current and as intended and are a complete and correct statement of the facts stated therein for performing the work or furnishing the labor, supplies, materials or equipment required by the RFP. This Proposer waives any claim for the return of its proposal on account of errors or omissions claimed to have been made in its proposal or for any other reason.

I certify that this response fully complies with the requirements as defined in the RFP, and that I am an authorized representative of the company to bind the firm to this response to the RFP for a 120-day period.

I certify that this Proposer is NOT on the U.S. Comptroller General's list of ineligible firms for federally financed and assisted construction, materials, equipment contracts or services.

Name of Authorized Representative Bradley A. Thomas
Title President

Signature of Authorized Representative 
Date 4/29/19

FORM B
PROPOSER CONTACT INFORMATION

Proposer

Firm Name: First Transit, Inc.

Authorized Representative Name: Bradley A. Thomas

Authorized Representative Title: President

Telephone Number: (513) 419-8604

Email Address: brad.thomas@firstgroup.com

Secondary Contact Name: Justin Pate

Secondary Contact Title: SVP Strategy & Growth

Telephone Number: (214) 662-0499

Email Address: justin.pate@firstgroup.com

Subcontractors to Proposer

Firm Name: N/A

Address: N/A

City, State, Zip N/A

Authorized Representative Name: N/A

Authorized Representative Title: N/A

Telephone Number: N/A

Email Address: N/A

Work to be performed: N/A

Is firm a qualified DBE? ☐ No ☐ Yes, Qualifying Agency: N/A

Annual dollar value of participation: \$ N/A

Firm Name: N/A

Address: N/A

City, State, Zip N/A

Authorized Representative Name: N/A

Authorized Representative Title: N/A

Telephone Number: N/A

Email Address: N/A

Work to be performed: N/A

Is firm a qualified DBE? ☐ No ☐ Yes, Qualifying Agency: N/A

Annual dollar value of participation: \$ N/A

Attach additional pages as necessary.

FORM C
ADDENDA ACKNOWLEDGEMENT

City of Monterey Park Local Transit Services
Fixed route

CONTRACTOR NAME: First Transit, Inc.

CONTRACTOR hereby acknowledges that it has received and read the following

Addenda:

Addendum # 1

Signature



Addendum #

Signature

Addendum #

Signature

Addendum #

Signature

Addendum #

Signature

FORM D
NON-COLLUSION AFFIDAVIT FOR CONTRACTOR

STATE OF CALIFORNIA COUNTY OF LOS ANGELES

Bradley A. Thomas (Name) declares and
says:

1. That he/she is the (owner, partner, representative, or agent) of
First Transit, Inc. (Contractor Name), hereinafter
referred to as (CONTRACTOR) or (subcontractor).

2. That he/she is fully informed regarding the preparation and contents of this
proposal for certain work in the City of Downey, State of California.

3. That his/her proposal is genuine and is not collusive or a sham proposal.

4. That any of its officers, owners, agents, representatives, employees, or parties in
interest, including this affiliate, has not in any way colluded, conspired, connived or
agreed, directly or indirectly, with any other CONTRACTOR, firm, or person to submit a
collusive or sham proposal in connection with such contract, or to refrain to submitting a
proposal in connection with such contract, or has in any manner, directly or indirectly,
sought by unlawful agreement or connivance with any other CONTRACTOR, firm, or
person to fix the price or prices in said proposal, or to secure through collusion,
conspiracy, connivance, or unlawful agreement any advantage against City, or any person
interested in the proposed contract; and,

5. That the price or prices quoted in the proposal are fair and proper, and are not
tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of
the CONTRACTOR, or any of its agents, owners, representatives, employees, or parties
in interest, including this affiliate.

I certify (or declare) under penalty of perjury, that the foregoing is true and correct.

Signature of Authorized Representative



Date

4/29/19

Name of Authorized Representative

Bradley A. Thomas

Title

President

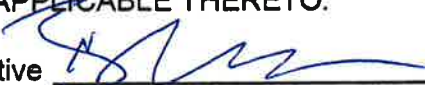
FORM E
**CERTIFICATION OF PRIMARY PARTICIPANT REGARDING DEBARMENT,
SUSPENSION, AND OTHER RESPONSIBILITY MATTERS**

The Primary Participant First Transit, Inc. (Name of CONTRACTOR) certified to the best of its knowledge and belief, that it and its principals:

- a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
- b. Have not, within a five year period preceding this proposal, been convicted, or had a civil judgment rendered against them for commission of fraud, or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes, or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false Statements, or receiving stolen property;
- c. Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and
- d. Have not within a five year period preceding this proposal had one or more public transactions (Federal, State or local) terminated for default.

If the primary participant is unable to certify to any of the Statements in this certification, the participant must attach an explanation to this certification.

THE PRIMARY PARTICIPANT, First Transit, Inc. (Name of CONTRACTOR) CERTIFIES OR AFFIRMS THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISIONS OF 31 USC SECTIONS 3801 ET SEQUA ARE APPLICABLE THERETO.

Signature of Authorized Representative 

Date

4/29/19

Name of Authorized Representative

Bradley A. Thomas

Title

President

The undersigned chief legal counsel (or corporate secretary) for the hereby certifies that the authorized Representative above has authority under State and local law to comply with the subject assurances and that the certification above has been legally made.

Signature of Attorney/Secretary 

Date

4/29/19

FORM F
REFERENCE # 1
FIXED ROUTE CLIENT REFERENCES
Copy this form for each of the 3 required references

CLIENT AGENCY NAME: City of Pasadena

SERVICE NAME:
Pasadena Trasnit

STREET ADDRESS:
221 East Walnut Street, Suite 199

CITY, STATE, ZIP:
Pasadena, CA, 91101

CONTACT PERSON: Valerie Gibson, Transit Manager

EMAIL ADDRESS: vgibson@cityofpasadena.net

PHONE NUMBER: (626) 744 - 3725 ext.

CONTRACT STATUS:

☒ Contract current, Beginning Date: 7/1/14 End Date: 7/1/19-7/1/21
☐ Contract Ended: N/A (give date)

Reason for contract termination: N/A

How long have/had you held this contract: 18 years

TYPE OF TRANSIT SERVICES MANAGED (check all that apply):

☒ Fixed Route: Number of Peak Vehicles: 21 Total Vehicles: 29
☒ Paratransit: Number of Peak Vehicles: 12 Total Vehicles: 15
☐ Other (describe):

PROVIDED BY CONTRACTOR (check all that apply):

☐ Revenue Vehicles ☒ Non-Service Vehicles ☐ Fuel
☒ Operating & Maint. Facility ☒ Radio Comm. System

Contractor must also list any contract that has been terminated and the reason of the termination of the contract in the last three years.

No First Transit contracts have been terminated in the last three years. For more information, please see the Experience and References section of our proposal (Contracts Ended Early).

FORM F
REFERENCE # 2
FIXED ROUTE CLIENT REFERENCES
Copy this form for each of the 3 required references

CLIENT AGENCY NAME: City of Sierra Madre

SERVICE NAME:

Gateway Coach

STREET ADDRESS:

232 W. Sierra Madre Blvd.

CITY, STATE, ZIP:

Sierra Madre, CA, 91024

CONTACT PERSON: James Carlson, Management Analyst

EMAIL ADDRESS: jcarlson@cityofsierramadre.com

PHONE NUMBER: (626) 355 - 7135 ext. 803

CONTRACT STATUS:

☒ Contract current, Beginning Date: 11/1/12 End Date: 11/1/15-10/31/20
☐ Contract Ended: N/A (give date)

Reason for contract termination: N/A

How long have/had you held this contract: 22 years

TYPE OF TRANSIT SERVICES MANAGED (check all that apply):

☒ Fixed Route: Number of Peak Vehicles: 4 Total Vehicles: 4
☒ Paratransit: Number of Peak Vehicles: 4 Total Vehicles: 4
☐ Other (describe): _____

PROVIDED BY CONTRACTOR (check all that apply):

☐ Revenue Vehicles ☒ Non-Service Vehicles ☒ Fuel
☒ Operating & Maint. Facility ☒ Radio Comm. System

Contractor must also list any contract that has been terminated and the reason of the termination of the contract in the last three years.

No First Transit contracts have been terminated in the last three years. For more information, please see the Experience and References section of our proposal (Contracts Ended Early).

FORM F
REFERENCE # 3
FIXED ROUTE CLIENT REFERENCES
Copy this form for each of the 3 required references

CLIENT AGENCY NAME: City of Cerritos

SERVICE NAME:
Cerritos on Wheels (COW)

STREET ADDRESS:
18125 Bloomfield Avenue

CITY, STATE, ZIP:
Cerritos, CA 90703

CONTACT PERSON: Kristin Aguila, Advanced Planning Manager

EMAIL ADDRESS: kaguila@cerritos.us

PHONE NUMBER: (562) 916 - 1205 ext.

CONTRACT STATUS:

☒ **Contract current, Beginning Date:** 7/1/13 **End Date:** 6/30/23
☐ **Contract Ended:** N/A (give date)

Reason for contract termination: N/A

How long have/had you held this contract: 6 years

TYPE OF TRANSIT SERVICES MANAGED (check all that apply):

☒ Fixed Route: Number of Peak Vehicles: 4 Total Vehicles: 4
☒ Paratransit: Number of Peak Vehicles: 2 Total Vehicles: 2
☐ Other (describe): _____

PROVIDED BY CONTRACTOR (check all that apply):

☐ Revenue Vehicles ☒ Non-Service Vehicles ☒ Fuel
☒ Operating & Maint. Facility ☒ Radio Comm. System

Contractor must also list any contract that has been terminated and the reason of the termination of the contract in the last three years.

No First Transit contracts have been terminated in the last three years. For more information, please see the Experience and References section of our proposal (Contracts Ended Early).



**CITY OF MONTEREY PARK
CALIFORNIA**

ADDENDUM NO. 1

**REQUEST FOR PROPOSAL (RFP)
TO PROVIDE LOCAL FIXED ROUTE TRANSPORTATION SERVICES**

April 19, 2019

This Addendum provides changes to the RFP and responses/clarifications to questions submitted by bidders.

ALL OTHER PORTIONS OF RFP SHALL REMAIN IN FULL FORCE AND EFFECT.

For further Information please contact Bonnie Tam at (626) 307-1383.

Please include a signed copy of this Addendum with your bid. Failure to do so will result in an invalid proposal.

Company: First Transit, Inc.


Signature

4/29/19
Date

	Reference	Question	City Response
1	RFP, Part A. Questions About This RFP, (p.5)	Please clarify the deadline to submit questions regarding the RFP – Page 5 “Important Dates” indicates April 9 th however also Page 5 “Questions About This RFP” states April 4 th .	This addendum replaces the April 4 th deadline on Page 5 “Questions about this RFP” to April 9 th as follows: <i>Proposers may submit written questions regarding the meaning or interpretation of the RFP. These questions must be requested in writing and received by Bonnie Tam, Principal Management Analyst, no later than April 9, 2019, 4:00 p.m. (PDT).</i>
2	General	Please provide the bus fleet inventory along with current mileage.	To be posted on the City's website.
3	General	Please clarify the size (seating capacity) required of the Contractor provided spare.	Contractor shall determine the seating capacity required to operate the service.
4	General	Please provide the existing bus fleet replacement schedule, if available.	5-7 years.
5	General	What type of farebox is currently in use? Are they owned by the City of the Contractor?	The non-GFI diamond-style fareboxes are currently in use. They are owned by the City. Buses also include TAP Card readers.
6	General	Please provide the existing Local Fixed Route Contract agreement and amendments.	To be posted on the City's website.
7	General	Are the current contractor employees represented by a Union? If so, may a copy of the existing Collective Bargaining Agreement (CBA) be provided?	The current contractor employees within this contract are not represented by a union.
8	General	Please provide last 3 months of Contractor Monthly Management Reports.	To be posted on the City's website.
9	General	Please provide the National Transit Database (NTD) reportable statistics for the last fiscal year.	To be posted on the City's website.
10	General	What has been the annual ridership statistics over the last 3 years?	FY 2015-16: 333,375 FY 2016-17: 299,033 FY 2017-18: 260,101
11	RFP, Part B. Scope of Services. Personnel. Administrative Staff Section,	Please clarify “Staff assisting with D-A-R reservations should have both English and Spanish language capabilities.”	There is no D-A-R component within this RFP. This addendum replaces Part B. Scope of Services. Personnel. Administrative

	(p.19)		Staff Section, (p.19) as follows: <i>The Contractor must supply a sufficient number of employees to staff the office at all required times. The Contractor will be responsible for training these employees and making sure that all program policies and procedures are understood and followed.</i>
12	General	Please provide the location of current contractor's operations, dispatch, and maintenance facility.	First Transit Headquarters 4337 Rowland Avenue El Monte, CA 91731
13	General	Please provide a list of any liquidated damages assessed in the past 12 months?	None.
14	General	Number of vehicle accidents and passenger injuries over the last 12 months.	There were a total of 7 vehicle accidents over the past 12 months.
15	General	Number of complaints over last 12 months.	There were a total of 15 complaints received over the past 12 months.
16	RFP, Part A. Instructions to Proposers. Contract Term And Extension Section, (p.6)	Would the City consider revising the extension year agreement terms to mutual discretion of the contractor and the City? Or alternatively, add a clause allowing for termination for convenience by either the contractor or the City?	Yes, it is negotiable.
17	RFP, Part A. Instructions to Proposers. Contract Term And Extension Section, (p.6)	With consideration to wages in this area increasing at a higher rate than CPI, would the city accept actual pricing submitted by bidders year over year within Attachment B?	No, the annual adjustment will be based on CPI.
18	RFP, Part B. Scope of Services. Fixed Route Bus System Section, (p.11)	Please clarify that lunch hours for operators are not included within the billable time as defined by RFP?	The Contractor is paid based on a number of vehicle revenue hours not vehicle service hours. Both revenue vehicle hours and service hours must be provided, in addition to miles for both, in the billings to the City.
19	RFP, Part B. Scope of Services. Fixed Route Bus System Section,	Seeing as billable hours exclude deadhead, please confirm how/why "Vehicle Revenue Hours may be less, depending on the location of the vehicle storage facility."	This addendum replaces Part B. Scope of Services. Fixed Route Bus System Section, (p.11) as follows:

	(p.11)		<i>The City estimates the total annual Revenue Vehicle Hours to be about 19,000 per year depending on holidays.</i>
20	RFP, Part B. Scope of Services. City Responsibilities. Termination of Contract Section, (p.12)	Would the City consider providing a minimum of 60-days notice for contract termination to accommodate for the WARN act requirement of 60 days notice to contractor employees?	No.
21	RFP, Part B. Scope of Services. Vehicle Section, (p.13)	RFP states: "Each vehicle must be inspected annually by the CHP. The City may also inspect the vehicles by a third-party inspector." Please confirm, as standard CHP inspections are for only a sample percentage of fleet and not the entire fleet?	Each vehicle must be inspected annually by the CHP. The City may also inspect the vehicles by a third-party inspector.
22	RFP, Part B. Scope of Services. Personnel Section, (p.18)	Please provide current staffing and wage levels per labor code 1072.	To be posted on the City's website.
23	RFP, Part C. Proposal Submission And Evaluation Criteria. Proposal Style/Format Section, (p.26)	RFP states: "Expensive or elaborate artwork, paper, covers, exhibits, and visual or other presentation aids are neither necessary nor wanted". Please confirm the City will accept submission of proposals bound within 3 ring binder with simple cover and tabs?	Proposers are requested to submit the proposal typewritten on plain, white bond paper, 8 ½" x 11" in dimension, in booklet form. The City will accept submission of proposals bound within 3 ring binder with simple cover and tabs.
24	RFP, Part B. Scope of Services. Radio Communication Section, (p.16)	Please confirm push to talk / direct connect radios are sufficient for this operation?	Yes.
25	RFP, Part B. Scope of Services. Radio Communication Section, (p.16)	Please confirm diamond style fareboxes are adequate for this service? Or does City require contractor provide GFI farebox technology within the new contract?	Yes, the non-GFI diamond-style fareboxes are adequate for this service. See question #5.
26	General	Will the city allow a contractor to submit alternative proposals and pricing in addition to our compliant pricing and proposal?	No.
27	RFP, Part B. Scope of Services. Proposed Transportation Services Section,	Within current contract vehicles are fueled at City facility at no cost to the contractor. Please confirm this practice will continue within the new contract.	Yes.

	(p.9)		
28	RFP, Part B. Scope of Services. Personnel. Administrative Staff Section, (p.19)	Per RFP, "Staff assisting with D-A-R reservations should have both English and Spanish language capabilities." Please confirm there is no dial-a-ride component within this RFP?	There is no D-A-R component within this RFP. See question #11.
29	RFP, Part B. Scope of Services. Vehicle Tracking Technology Section, (p.14)	Please confirm whether the requested vehicle tracking technology must be available in a customer-facing application or if GPS technology available to be viewed by contractor and client is sufficient?	Proposers can submit proposals for a system that can be viewed by customers, contractor and client, and/or contractor and client only.
30	RFP, Attachment E. Sample Contract, (p.3 of 9)	Please confirm the City requires a performance bond of \$100,000 within the term of the contract.	Yes.
31	RFP, Attachment B and D, (p.43 & 46)	Please provide required pricing forms (Attachment B and Attachment D) in Excel format.	Only Word format is available. To be posted on the City's website.
32	RFP, Part B. Scope of Services. Vehicle Cameras Section, (p.13-14)	Currently, some buses have cameras on board. Please confirm if Contractor will be able to utilize this hardware to suffice the requirement for 2 cameras within each vehicle? Please describe the manufacturer make and model of these cameras and roster of vehicles for which they are installed. Please clarify if the City has any on-going camera agreements that the Contractor may utilize.	Yes. The model of the cameras is REI's. Only Bus #106 has the camera installed. Currently, the City does not have any on-going camera agreements that the Contractor may utilize.
33	RFP, Attachment E. Sample Contract, (p.5 of 9)	Please clarify that the indemnification language included in sample contract only covers the work performed by the contractor.	This question needs clarification. Indemnification language is the broadest possible to protect the City.

PROJECT UNDERSTANDING

The Proposer should elaborate on what it sees as the critical path issues of this project. The Proposer is encouraged not to simply restate the scope of work for the project but rather demonstrate their unique observations and understanding of the service, its problems, and its potential. Proposals for the service should indicate an understanding for demand-response services and a plan for simultaneous coordination and operation of all services.

FIRST TRANSIT AND THE CITY OF MONTEREY PARK, A COLLABORATIVE PARTNERSHIP

As a company, First Transit's history, shared with Monterey Park for 10 years, has been one of growth, innovation, and quality service achievement. Throughout our partnership with Monterey Park, we have created a foundation of solid performance and shared goals for the agency's Fixed Route services. We have achieved many successes during the history of our partnership, providing our shared customers safe, dependable, clean, customer-friendly, and efficient transportation services.



10 Years

Of collaborative partnership
between First Transit and the
City of Monterey Park

Building upon our first-hand experience, unrivaled understanding of this operation, and shared vision and goals to determine our roadmap moving forward, First Transit is confident that we are the best choice to continue to provide these valuable transportation services. More than an operator, First Transit's local staff who call the San Gabriel Valley home are committed to elevating these services to achieve Monterey Park's long-term service plans.

Together, our vision has always focused on providing top quality service that keeps our customers at the heart of everything we do. When we create an atmosphere that provides everyone the respect and dignity they deserve—whether a customer, employee, or the public—we achieve this vision.

As the successful provider of these services for a combined ten years, we have unique insight into the passengers' preferences, Monterey Park's expectations and goals, a familiarity with the geographic location and potential service challenges. Our refreshed First Transit management team brings a depth of experience, as well customized tools and revised procedures, that none of our competitors can touch. Together, we will continue to achieve our shared goals for the system's success.



A SOLID FOUNDATION FOR SUCCESS

Nothing is more important in demonstrating First Transit's qualifications to continue to provide Fixed Route services for Monterey Park, as well as our ability to provide a seamless transition to a new contract, than our long-standing partnership with you, our understanding of the services provided, and the solid foundation we have built together over the last five years. We will continue to embrace practices and procedures that have been successful and continually work towards improvements for the City of Monterey Park and our shared ridership. We are proud of the culture we have established, and will continue to:

- **Support the Monterey Park community** – since our collaboration began with the City, First Transit has transported nearly 3,000,000 Monterey Park riders. Whether going to a doctor's appointment, grocery shopping, or school, the City's riders have come to rely on Spirit Bus services. Furthermore, our discounted rates to the City support involvement in community programs such as the Lunar New Year Festival, the Cherry Blossom Festival, and the Holiday Snow Village. We will continue to provide such support throughout the new contract.
- **Elevate the Monterey Park community** – identifying talented staff from within the community and surrounding areas and placing them in positions to grow is an important part of our core values (Supportive of Each Other). We have developed team members and afforded them growth opportunities. One example is our Operations & Safety Manager, Juan Casillas. Juan began driving for First Transit at the start of the Monterey Park contract in 2015. After driving for one year, he displayed potential for growth, and was promoted to a dispatcher position. When the Operations & Safety Manager position opened, our GM chose Juan, and he has excelled in the role.
- **Dedicate ourselves to the Monterey Park community** – First Transit drivers have forged relationships with Spirit Bus riders. Communication can be difficult when riders and drivers have different native languages. However, one of our core values is to make mobility easy, and so our drivers work with Monterey Park passengers daily to achieve their shared goal—getting passengers to their destinations safely and conveniently. Over time, alternate means of communicating have emerged, and thus has formed a level of comfort and ease for the passenger to which they have now grown accustomed—they know and trust our drivers, and our drivers know how to serve them.

"Here at First Transit, there is always room to grow!"

- Juan Casillas,
Operations & Safety
Manager, Monterey
Park

*"I love the feeling of making a difference in our community. Our riders rely on us, and we rely on our riders."
— Ezequiel Jimenez, Road Supervisor*



OUR SHARED PHILOSOPHY

The partnership between Monterey Park and First Transit will only continue to succeed if we have a collaborative, transparent partnership focused on shared goals and objectives. Working together to continue to achieve these objectives moving forward will be a strong focus of our implementation process for the new contract. As described in detail throughout our proposal, First Transit will assist the City in achieving our shared priorities of customer satisfaction, safety and reliability, and cost effectiveness, by:

- **Maintaining a strong commitment to providing customer satisfaction through friendly and courteous service** – Customer service is in everything we do. We require all First Transit employees who interact with passengers to complete our extensive Customer Service training to help our employees identify customers' needs and expectations, and to deliver on them. In addition to new employee training, customer service is reiterated throughout our ongoing training program and all First Transit meetings.
- **Establishing a safe and reliable service that meets or exceeds the service and performance standards as defined in this RFP** – Through First Transit's industry-leading training programs, and our world class safety culture, we are dedicated to reducing the number of accidents and incidents, improving the safety of the system. Included in Section G of our Operations Plan are details on First Transit's BeSafe Safety Leadership Program. As detailed throughout our Maintenance Plan, First Transit employs a wide range of technology solutions, training, and tools to deliver world-class maintenance and service to help ensure Monterey Park's vehicles are always where they belong—on the road serving our customers.
- **Continuing our long-term, stable relationship by bringing efficiencies, new methods, new technology and techniques to implement a successful transit service** – Under the leadership of our refreshed local management team, First Transit is proud to introduce a number of new solutions as outlined throughout this proposal, as well as leverage existing advantages, to improve every aspect of the Spirit Bus system.
- **Providing a cost-effective service to maximize available resources** – First Transit understands the critical nature of City resources. We strive to provide exceptional cost savings, while maintaining our high levels of service, by providing value-added technology solutions, keeping safety as our highest priority to minimize downtime, and maintaining positive employee relations to maximize productivity and reduce turnover.

LOOKING AHEAD

Although we are proud of our performance in the provision of Monterey Park's Fixed Route services, we always strive for continual improvement, working to earn your business every single day. In the new contract period, we will continue to provide the safe, customer-focused, high-quality transportation services you have come to expect from us, with meaningful enhancements to continue to improve our service delivery. As the successful incumbent



provider, most of our personnel, programs and initiatives are already in place. Our seamless transition process will focus on evaluating the success of our current operations, while also continue looking forward with innovative technologies, methods, and initiatives to take Monterey Park's Fixed Route services to the next level. These include:

- The potential to work with the City in moving towards an innovative transit model that could incorporate into existing Fixed Route services a Transportation Network Company (TNC) component, such as Lyft.
- Installation of DriveCam camera technology in all Monterey Park buses to enable video monitoring and review of bus conditions and events
- Deploying Doublemap vehicle tracking technology, including a customer-facing app
- Our General Manager, Brent Johnson, will enhance regular communications with Monterey Park staff to give updates, discuss concerns, and plan continued success.
- Leveraging First Transit's nationwide resources to assist the City with NTD and other reporting needs

We will further leverage existing advantages, such as:

- Shared services – our location for Monterey Park also houses four other contracts from which Monterey Park benefits through cost savings and knowledge sharing
- A refreshed management team – the past several months have seen strong improvements related to communication and customer service, and we plan to build on those successes

OVERCOMING CHALLENGES - CRITICAL PATH ISSUES

RIDERSHIP

First Transit understands that ridership on Monterey Spirit Bus service has declined year-over-year. Marketing may remediate this, and so First Transit will help increase public awareness and ridership by committing to the following activities as the City sees fit:

- Distributing all program-related and promotional materials
- Maintaining ad frames placed on bus interiors and exteriors
- Providing reasonable access to buses for placement of promotional or advertising materials

Another way to encourage potential riders is to offer a superior transportation experience. In accordance with our own core philosophies, First Transit will continue to strive to provide such a service by committing to the following:

- Providing excellent service in every customer interaction
- Focusing on safety as a top priority
- Exceeding your expectations for service reliability

- Maximizing your transportation investment

MORE EFFICIENCY IN SERVICE DELIVERY

SHARED SERVICES

To deliver the most cost-effective services to the City of Monterey Park, First Transit leverages the efficiency of shared services for its operation of the Spirit Bus. Our location in El Monte houses operations for three contracts in addition to Monterey Park. The primary result is a team of high performing, cross-trained staff performing similar functions for four contracts, and each contract pays only for its share of the services. No other contractor can provide that kind of savings to Monterey Park. A secondary result is that Monterey Park's bus service benefits from the team's collaboration, cooperation, and lessons learned...the best practices of four cities' bus operations funneled into Monterey Park's Spirit Bus operations.

"[The staff in El Monte] value each city as their own people and their own culture, but we've coalesced as a team to bring new management and new goals to all the cities together as one."

— *Narcisa Silva, First Transit Project Manager, Arcadia (El Monte location)*

HIRING/RETENTION

As discussed in our Operations Plan, Section C – Staffing Plan, First Transit views itself as more than just a provider of transit services. We're a community resource. We take that pledge to the City of Monterey Park seriously, and fulfilling it involves having the right people in place, which we do in a number of ways.



Recruiting high-quality drivers is a challenge across the transit industry and among all communities. To select the highest-quality candidates from the San Gabriel Valley community—those who understand our commitment to safety, reliability, and customer service—we require a safe driving record, past employment verification, a criminal background check, a motor vehicle record review, employment eligibility verification, and a drug screen.

To keep those employees, especially in this era of record-low unemployment, we make efforts to ensure our workforce is engaged and satisfied. As a small example, drivers and technicians each have their own climate-controlled breakrooms, complete with vending machines, comfortable seating, WiFi, and cable television. The local management team also holds various events throughout the year to celebrate the hard work and accomplishments of our team members.



IMPROVEMENTS IN SAFETY/ON-TIME PERFORMANCE

Safety and On-time Performance are the cornerstones of any successful transit program, and First Transit commits to continual improvement in our service delivery in these areas for Monterey Park.

Safety – Our BeSafe Safety Leadership training program goes far beyond traditional compliance efforts by creating a culture of engagement in which safety permeates every facet of our business. The program design focuses on the use of positive reinforcement to build safe operational practices. For example, we are the only transportation provider providing truly one-on-one behind the wheel training, making sure each driver receives the customized feedback and support to be truly ready to get behind the wheel. By improving the knowledge, foresight, awareness, judgment, and skills of our employees, we encourage preventive approaches to safety. This strengthens safe behaviors, so they happen more often, thus improving safety performance and the passenger experience.

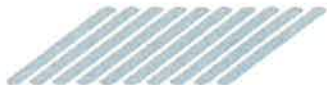
On-time Performance (OTP) – A fundamental influence on OTP is vehicle condition and availability. To ensure your vehicles are ready for service, and performing at their peak potential, First Transit employs rigorous preventative maintenance and thorough inspections. Each technician has undergone exhaustive training, and we actively encourage and reward ASE certification, so when a vehicle requires repair, First Transit technicians will perform promptly and accurately. Another service influencing On-time Performance is dispatch service. Successful dispatching means staying ahead of traffic issues and providing effective communication and road supervision coverage/service monitoring to employ solutions before challenges become service problems.

TECHNOLOGY SOLUTIONS FOR MONTEREY PARK

DRIVECAM SF64

To enhance the safety of our passengers and drivers, First Transit is pleased to propose DriveCam technology for the Monterey Park fleet. DriveCam SF64 is an on-board camera audio/video data recording system that can record continuously or can be triggered when particular events happen – accidents, aggressive accelerations, sudden stops, hard cornering, or manual driver activation. Once triggered, the system records video and audio information that took place several seconds before, during, and after the event both inside and outside the vehicle. This video is automatically stored and uploaded to DriveCam for further review. This innovative system is designed to reduce the risks involved in driving by providing feedback on both exemplary driving behaviors and behaviors that need improvement. The system helps to ensure that each driver continually practices safe driving behaviors every moment while behind the wheel.





DriveCam personnel analyzes, reviews, and scores uploaded videos and sends them to First Transit safety personnel who uses the scores to facilitate one-on-one coaching for specific drivers. Coaching includes a review of the event video, discussion, and feedback on the exhibited driving behaviors. This allows the driver to see driving behaviors that need improvement, and to focus on changing these behaviors into positive driving habits.

First Transit management, as well as the City, can also review the videos at any time without waiting on DriveCam. The system provides DVR capability that can store up to 100 hours of continuously-recoded vehicle footage that managers can use for incident investigations or re-training sessions. DriveCam also allows livestreaming both inside and outside views of any vehicle in the fleet.

DriveCam SF64 also provides additional protections for our passengers as well as our drivers. A manual activation switch on the unit can be utilized by the driver to capture events on board the vehicle such as:

- Record the actions of violent or abusive riders
- Record the drivers' handling of difficult situations on-board
- Document unusual situations for later review by City and First Transit staff

In order to meet Monterey Park's requirements, First Transit has included in our proposed solutions a second camera for each vehicle, as well as the DriveCam Hub module to allow connection.

The key to the success of any tool is to make certain that it is used effectively through education and training. We believe that Monterey Park will see the system's Accident Frequency Ratio lower with the introduction of this innovative system.

An optional DriveCam enhancement is the Advanced Driver Assistance Systems (ADAS) management to provide coaching on triggered events.

DOUBLEMAP CAD/AVL

First Transit's proposal includes DoubleMap CAD/AVL for real-time vehicle tracking so dispatchers and supervisors know exactly where the vehicles are located at all times. Dispatchers and Supervisors can also monitor on time performance using the DoubleMap system. Additionally, DoubleMap provides a mobile app for the fixed route service that will provide real-time information to riders, so they can plan their trips effectively. Finally, historical data will assist in planning schedules and provide the ability to look at alternative routes that may be more efficient or better serve the City of Monterey Park community in the future.

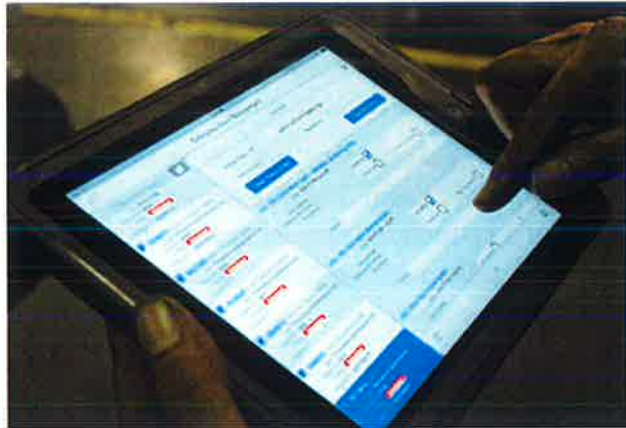
Customer Facing App- with the DoubleMap AVL system we are proud to offer our passengers a City of Monterey Park mobile app that will add benefits to their daily commute. Through the administration dashboard the City of Monterey Park and First Transit staff can easily update routes, vehicles, and schedules. Riders can access the information on an internet enabled mobile device. Using the device's GPS, a listing of the closest stops will appear along with route information and vehicle ETA.



PAPERLESS SHOP

First Transit offers an innovative approach to the typical maintenance workflow through our Paperless Shops initiative. In a typical shop, a paper work order is on average touched 10 times before maintenance resolves the issue. Our paperless shops streamline the process by offering all forms, work orders, and tasks via tablets.

More details on our Paperless Shop program can be found in the Preventative Maintenance Inspection section of our Maintenance Plan.



FIRSTBASE, POWERED BY INFOR

FirstBase Maintenance Information System (FirstBase) is our software platform for vehicle maintenance files, reporting, and task supervision using our Paperless Shop system. A transit-specific software designed for the unique requirements of a bus fleet, FirstBase captures and supplies critical data to give our maintenance team the information needed to keep each Monterey Park vehicle in "like new" condition.



More details on our FirstBase platform can be found in the Management of the Maintenance Process section of our Maintenance Plan.

ROAD SUPERVISOR TABLETS

First Transit will equip our road supervisors with tablet computers, allowing them to stay connected while out in the field. Up-to-date access on system performance will increase awareness and allow our supervisors to address minor issues before they become real problems. This communication tool will be instrumental in providing effective, comprehensive and educated on-road supervision.

More details on our tablet rollout can be found in the Road Supervisors section of our Operations Supervision Plan within our Operations Plan.



INNOVATION FOR THE FUTURE: POTENTIAL LYFT INTEGRATION

First Transit has been collaborating with Lyft over the past several years to determine how this new form of transportation can be integrated into the existing public transit model. Through our partnership with Lyft, First Transit has developed an innovative approach to delivery of transit services, including utilizing Lyft in conjunction with traditional fixed route transit to provide greater efficiencies to our clients, and conveniences for our shared customers. **Should the City of Monterey Park be interested, First Transit would like to further discuss the potential of implementing Lyft services into the current Spirit Bus operations.**



As your incumbent provider, First Transit has witnessed the decrease in Spirit Bus ridership year over year. While we are committed to working with you to increase overall ridership through traditional methods, we also believe that additional efficiencies could be provided to the City through the innovative implementation of Lyft services within the existing operations.

First Transit is excited to work with you directly to review all routes and ridership data within the Spirit Bus system, and collectively decide what modifications should be made to current services within times and areas of low ridership. Through this collective assessment, we hope to help the City identify areas where it would be beneficial to reduce traditional fixed route services, while simultaneously providing service during these times through supplemented Lyft trips.

Leveraging First Transit's current partnership with Lyft, we hope to work with the City to establish a program in which Lyft rides within the Monterey Park service area can be offered at a discounted rate through supplemental funding by the City for these trips, resulting in overall savings with the reduction in inefficient Fixed Route services. With First Transit providing the administrative support required for this program, customers will be able to book trips both through the Lyft app directly, and also through calling in to our operation and utilizing the Lyft Concierge platform.

We understand the multitude of working pieces that will have to be evaluated and be coordinated to establish a successful Lyft program within the City of Monterey Park, and that ultimately the City must determine the potential value in such a program. First Transit, however, would like to extend the invitation to begin discussions regarding the incorporation of Lyft with the City, and offer our partnership in navigating the ever-changing transit needs of Monterey Park together.



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EXPERIENCE AND REFERENCES

The Proposer should describe past and present experience in providing municipal transit services. The Proposer should provide a listing and description of all projects currently under contract to the Proposer, especially those that most closely represent the operation profile of the City's transit services.

Provide a reference for each project under contract, including the name, position title, address, and phone number for each. Please explain the reasons behind any contract terminated before its scheduled conclusion.

COMPANY INTRODUCTION

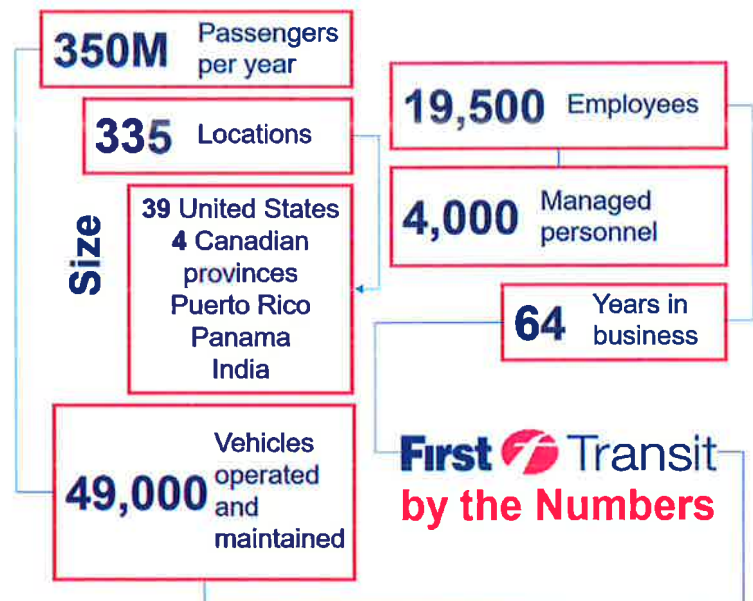
First Transit, Inc. supplies precision, efficiency, innovation, and all-around expertise to both public and private transportation systems. For over 60 years, First Transit has hands-on experience with every facet of transportation operations, maintenance, and administration. As the nation's leading provider of public transportation contracting and management services, we know transit.

Headquartered in Cincinnati, Ohio, First Transit operates in 335 locations, carrying more than 350 million passengers annually throughout the United States in 39 states, Puerto Rico, Panama, India and four Canadian provinces.

By using the unique talents of the professionals in each business unit across the breadth of the company, First Transit participates on projects of all types, sizes, and scopes. Applied in many operating environments, our varied skills include:



- Traditional Fixed Route and ADA paratransit services under management contracts or turnkey operations
- ADA Call Centers Services and brokerage services for human service transportation
- Flexible Route systems
- Rural and Urban Transit systems
- University Transportation services
- Airport Shuttle services
- Microtransit Mobility solutions
- Autonomous Vehicle operations
- Mobility as a Service solutions
- Streetcar and Rail systems
- Maintenance and facilities management
- Alternative fuel operations, including electric, hybrid, and compressed gas-powered coaches



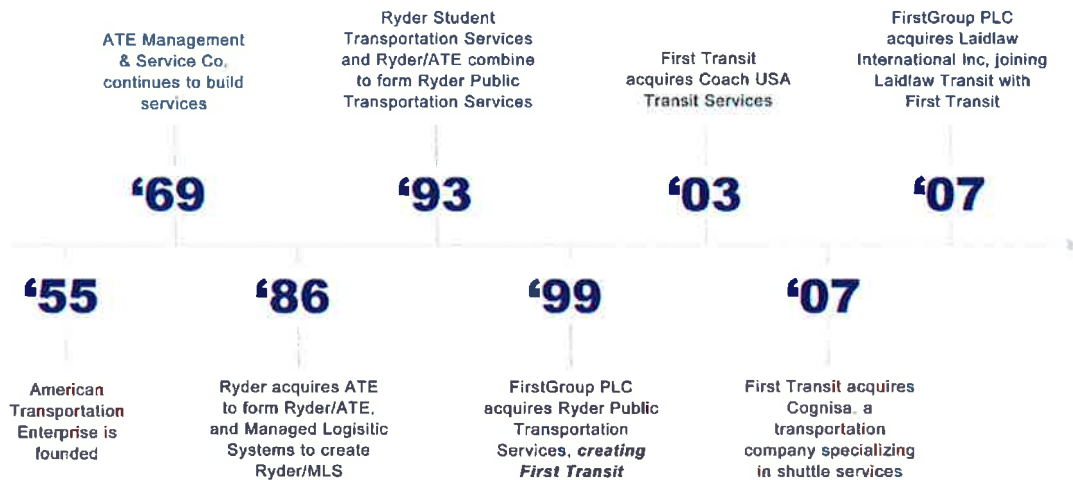
FIRST TRANSIT'S HISTORY

Our firm's growth is a direct result of our willingness to embrace change and the desire to build partnerships to achieve common goals.

Founded in 1955 as American Transportation Enterprises, First Transit has had several acquisitions and name iterations. In 1999, the firm was acquired by FirstGroup, plc, our UK-based parent company, and became First Transit.

IMPORTANT DATES

IN OUR HISTORY



FirstGroup is the largest international surface transportation group in the world – with strengths across all five divisions. Sister companies include First Student (transport 5 million student journeys per day), First Vehicle Services (manages and supports 35,000 pieces of equipment North America), Greyhound (16 million passengers annually), UK Bus (1/5 of all local bus service in the UK), and UK Rail (the UK's largest rail operator).

Our name has changed periodically, but our forward-thinking corporate culture of developing our people, using our expertise, and sharing our best practices has always been—and continues to be—steadfast.

OUR VISION AND VALUES

Our Vision: We provide easy and convenient mobility, improving quality of life by connecting people and communities.

With the world's population now exceeding seven billion and more people living closer together, the problems of congestion multiply and the need for creative transport solutions increases. At the same time, customers expect higher levels of service with greater efficiencies. First Transit is up to the challenge.

First Transit understands transportation systems are the lifeblood of communities—





and we work in partnership with customers to help our communities thrive. FirstGroup has grown to become the leading transport operator in the UK and North America. Every day on both sides of the Atlantic, we are relied on to connect communities, making it easier for millions of people to live their lives.

Every one of our FirstGroup employees works hard to deliver vitally important services for our passengers. Each year 2.5 billion passengers rely on FirstGroup to get to work, education, to visit family and friends, and much more. Our services open opportunities and experiences and help to create strong, vibrant, and sustainable local economies. Our goal is to be the organization that provides mobility solutions to help people, and communities to prosper.

At First Transit, we achieve this through our employees holding strong to our five core values and exemplifying these values every day. We prove our **commitment to our customers**, with over 94% on-time performance as a company. Our **dedication to safety** is displayed as we begin every meeting with a safety message. We **set the highest standards** for ourselves and each other, demonstrated by having more ASE Certified maintenance shops than any other competitor. We **support each other** with regional management teams standing ready to aid local managers with daily challenges. We **hold each other accountable** for our performance with our Dashboard application, displaying performance data.

OUR VALUES



FIXED ROUTE EXPERIENCE

In addition to our Monterey Park services, First Transit operates safe, reliable, and cost-effective fixed route operations throughout North America, Panama, Puerto Rico, and India. Our fixed route contracts include traditional fixed route, deviated, shuttle (universities, airports, and private companies) and Bus Rapid Transit (BRT) services, as well as transit management and multimodal contracts. **We have successfully operated fixed route projects since our start in 1955.**

The majority of our 335 locations are either fixed route or include a fixed route component. Our turnkey packages are customized for each specific client, offering a comprehensive, solution-specific approach.

“First Transit has been an efficient and cost-effective operator with a history of excellent performance, accountability and customer satisfaction.”—Snohomish County Client Feedback

2019 FIRST TRANSIT CUSTOMER SURVEY RESULTS

First Transit's Fixed Route Clients – Overall Satisfaction Rating

Scale of 1 to 10

City of Santa Cruz (CA):	10
Fort Bend County (TX):	10
Metropolitan Council (MN):	10
El Paso County (TX):	10
San Diego Metropolitan Transit (CA):	9.5
Houston Metro (TX):	9
Allegany County (NY):	9
Snohomish County (WA):	9
Denver Regional Transit District (CO):	9
City of Rochester (MN):	9

Our clients have seen measurable performance improvements at many locations shortly after First Transit began operations, including enhancements to safety, training, customer service, efficiency, employee relations, and customer/contractor relationships. A sample list of current First Transit fixed route customers is offered below.

Account Name	Customer Since	Fleet Size
City of Olean (Olean, NY)	2008	58
Denver Regional Transportation District, 3 contracts, (Denver, CO)	1988	333
Eastern Contra Costa Transit Authority (Antioch, CA)	1986	93



Account Name	Customer Since	Fleet Size
Houston Metropolitan Transit Authority (Houston, TX)	2007	197
El Paso County (El Paso, TX)	2014	241
Orange County Transportation Authority (Orange County, CA)	2015	252
Potomac & Rappahannock Transportation Commission (Woodbridge, VA)	2003	154
Snohomish County Area Public Transportation (Everett, WA)	1997	126
SouthWest Transit (Eden Prairie, MN)	1985	60
Valley Metro (City of Mesa & City of Tempe, AZ)	2013	311

First Transit prides itself on the continued improvements to our fixed route locations. We invest in our clients, our staff, and passengers through enhancements in: safety, training, customer service, operations efficiencies, employee relations, and customer and contractor relationships. These areas are the foundation to creating a lasting partnership with our clients.



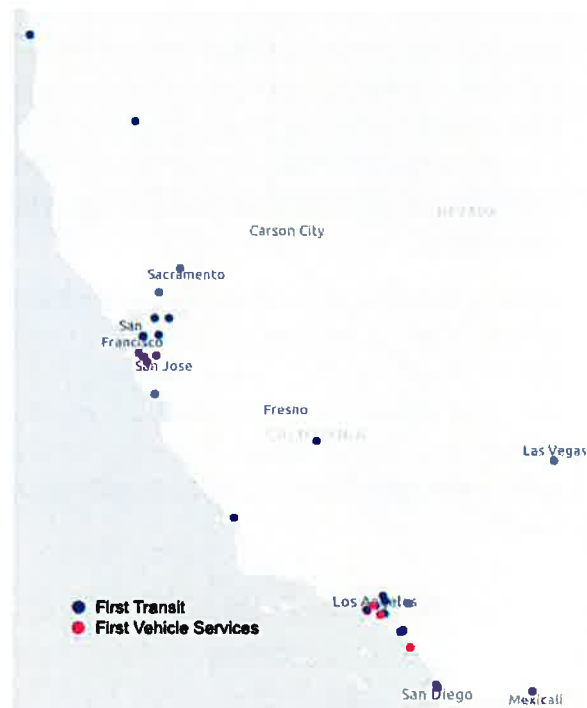
*"We have a long history with the local management team. They are all solid professionals and we appreciate having the good fortune to work with them. All in all, we are very satisfied with the service we receive from First Transit."—
Metropolitan Council Client Feedback*

CALIFORNIA EXPERIENCE

With **over 70 locations across the State of California**, FirstGroup America (including First Transit, First Vehicle Services, First Student, and Greyhound) is by far the largest private supplier of transportation services in the state. First Transit and First Vehicle Services alone have **35 separate contracts** in California.

First Transit's California locations include all types of transit operations, including three separate Shared Autonomous Vehicle (SAV) contracts, shuttle locations with just a couple of vehicles, and large fixed route and paratransit operations with hundreds of vehicles.

First Transit and First Vehicle Services' multiple California locations offer opportunities for shared resources and development of best practices with existing and future First Transit locations.



INNOVATION

As a global leader in transit operations and safety, First Transit is constantly looking for opportunities to expand our innovations. To this end, we have partnered with GoMentum Station in Concord, CA – one of 10 approved autonomous vehicle testing grounds – to be the exclusive partner to test Shared Autonomous Vehicles (SAV). First Transit and GoMentum Station partnered with the Contra Costa Transit Authority (CCTA) to begin SAV testing on public roads at the Bishop Ranch office park in San Ramon, CA.





LONGEVITY

Although the sheer number of our contracts are impressive, what is important is the quality of service First Transit has brought to each of our locations, the strong relationships with our clients, and the improved transportation services for our shared customers.

Nothing speaks to our strength as a transportation provider like the number of clients who renew contracts with us. First Transit has a strong company-wide record but even more so with our California locations. **Many of our California clients have been with First Transit for two decades or more!**



30 years

First Transit has partnered with Eastern Contra Costa Transit Authority in Antioch, CA to operate fixed route and paratransit services for over three decades.

“The local First Transit team is supported by an extensive corporate team that has been invaluable over the years. I am impressed with the depth of available support, the ongoing training provided to the local management team, and the overall approach to employee management.”—Jeanne Krieg, Eastern Contra Costa Transit Authority Chief Executive Officer

CALIFORNIA HIGHWAY PATROL (CHP) INSPECTIONS

We can assure Monterey Park that we are committed to running our facilities in a manner that merits positive ratings from regulatory agencies, including California Highway Patrol (CHP) inspections. We take considerable pride in our preventive maintenance programs for both fleet and facility and ensure that all aspects of our operation meet our standards for excellence. **First Transit has never failed a CHP inspection due to mechanical fault.**



ALTERNATIVE FUELS

First Transit supports and encourages the use of alternative fuels in our transit operations in the State of California.

- Currently, all vehicles in the **Monterey Park** fleet, which we operate and maintain, are **compressed natural gas (CNG)**

- In 1992, Laidlaw (now part of First Transit) inaugurated the **first fully dedicated fleet of CNG vehicles** for LADOT in the San Fernando Valley
- We have used **liquid propane gas (LPG)-fueled vehicles** for LADOT in Los Angeles, and in the cities of Glendale and Cerritos
- Under a contract with LADOT, we run **60 LPG-fueled buses** for the Downtown DASH service
- Experience with **electric vehicles** includes our current operations at LADOT DASH, and experience in Pasadena, CA.

AWARDS AND RECOGNITIONS

- **Best system of its size in North America**—Tri Delta Transit—Eastern Contra Costa Transit Authority—American Public Transportation Association (APTA)
- **Service Provider of the Year**—San Andreas Regional Center—Santa Cruz
- **CTAA Rural System of the Year**—Estuary Transit District

FIXED ROUTE EXPERIENCE

First Transit's combined ten years' experience operating Monterey Park's service has provided invaluable insights into its unique opportunities and challenges. In addition, we operate safe, reliable, and cost-effective fixed route operations throughout the United States and Puerto Rico. From large to small communities, our fixed route contracts include traditional fixed route, deviated, shuttle (universities, airports, and private companies), as well as transit management and multimodal contracts.



The majority of our 335 locations are either fixed route or include a fixed route component. Our turnkey packages are customized for each client—no matter the size of the community—offering a comprehensive, solution-specific approach to meet Monterey Park's requirements.

We can offer the level of customized fixed route service that Monterey Park needs. Our nationwide experience brings industry-leading best practices to your community, with the high quality you deserve. First Transit has the experience to provide the highest quality service to our shared customers – the ridership.

Across North America, First Transit has brought improvements in safety, training, and customer service initiatives to our fixed route locations. Additionally, we will continue provide operational efficiencies and an improved customer/contractor relationship to meet your community's needs.



SIMILAR SERVICES

First Transit is a proud partner of transit agencies nationwide. We work cooperatively with our customers to ensure that all aspects of transit service are met, with the goal of exceeding our customers' expectations. This includes not only our service on the road but being a part of the communities that we serve.

Our longstanding relationships with our customers is what drives us to continuously improve our services and apply industry-leading best practices in everything we do—no matter how large or small the operation.



Several current First Transit customers that operate near Monterey Park are discussed below. First Transit partners with agencies to operate from just a few vehicles to over 300, ensuring that we have the 'right-sized' experience to meet Monterey Park's needs.

CITY OF PASADENA



For nearly 20 years, First Transit has operated both the Fixed Route and Paratransit bus operations for the City of Pasadena.

In that time, our roughly 90 employees have operated and maintained 44 city-owned vehicles. Last year alone, Pasadena transported 1.6 million riders from 400 bus stops to their destinations safely.

In 2017, Pasadena Transit was awarded Outstanding Transportation Agency by the California Association for Coordinated Transportation (CalACT), the largest state transit association in the country, for its "exemplary local transit services." CalACT also recognized Pasadena's "extremely high on-time performance," which last year averaged 97%.

CITY OF SIERRA MADRE



The City of Sierra Madre is another municipality that benefits from the shared services at our location in El Monte. The system enjoys all the same benefits as Monterey Park's in terms of operational efficiencies, best practice sharing, and a highly-collaborative approach both within its operations team, and with the City.

Sierra Madre has partnered with First Transit for both its fixed Route and Paratransit services since 1997, and the City's residents, just like Monterey Park's, have grown to know and rely on the four First Transit drivers dedicated solely to their City's service.

“Sierra Madre’s a small, quiet, family-oriented community, so a personal touch is important.”—Brent Johnson, General Manager, First Transit’s El Monte, CA operation

CITY OF CERRITOS



First Transit has operated the Fixed Route and Paratransit services for the City of Cerritos for nearly six years. Much like Monterey Park and Sierra Madre, our current driving team has forged relationships in the community—50% of the drivers have worked there for over 10 years, while 25% have worked there for over 25 years. Total employees of the service numbers 14.

First Transit maintains the small city-owned fleet of five buses, which covers 110 stops throughout the City, and COW’s On-time Performance and Customer Service levels are consistently excellent.

“We keep our clients at the city well informed always, and get in front of any issues that may arise.”—Laura Lamb, General Manager, First Transit’s Cerritos operation

Full contact information for these three clients can be found in our Required Materials section.

PROJECT LISTING

Please see our Attachments section for a full listing of First Transit’s current Fixed Route contracts.

CONTRACTS ENDING EARLY

Occasionally, First Transit has had contracts terminated early by mutual agreement of the parties. Common reasons included allowing the respective transit authorities time to address funding issues, and to allow changes to the scope of work. No early terminations were related to First Transit’s performance, or our ability to service the contracts.

- **Dallas, TX – 2003:** DART was adding to their rail lines during an economic recession and had to significantly reduce bus service. By agreement, the contract was terminated to avoid layoffs of DART personnel. DART has since taken the service in house.
- **Beaver County, PA – 2003:** First Transit was awarded a contract previously operated by two local service providers. After combining these services, the client wanted to bring the combined service in house, and by mutual agreement the contract was terminated.
- **Los Angeles Department of Transportation, CA – 2006:** First Transit did not originally negotiate a fuel escalation clause. We attempted to negotiate the clause during the term



of the contract and were unable to reach agreement. We continue to serve the LA DOT under other contracts.

- **Montgomery County, MD – 2007:** First Transit had option years available but could not operate the service at the bid rates. The issue involved the vehicles purchased, which were not suitable for the service. We asked the client to put the work out to bid during the option years.
- **Boston, MA – 2009:** First Transit did not enter into a contract with the MBTA, nor did we perform any services for the MBTA. First Transit was selected as the low bidder and the parties tried to enter into contractual negotiations. However, during the negotiations we expressed concerns over the viability of undertaking the work. Before both parties were able to address our concerns, the MBTA decided to go with the next bidder.

START-UP PLAN

Describe the activities and resources that will be put in place for initial start up of this project. This section must specifically include, at a minimum, the following information:

A. IMPLEMENTATION SCHEDULES

Provide a detailed timeline of all implementation preparations and factors.

As the successful incumbent provider for these important transportation services, First Transit is the only contractor who can provide a truly seamless transition to a new contract. Monterey Park's riders will continue to see the high-quality service they have come to expect from us without any disruptions.

First Transit maintains a full staff on-site at its El Monte location, led by the General Manager, Brent Johnson. To ensure a smooth transition into the next contract, Brent, and Region Vice President, Jay Jeter, will meet with Monterey Park to ensure that all required program plans are delivered on-time for the new contract. Upon contract award, Brent Johnson, Jay Jeter, and Senior Vice President, Fadi Chakbazof, will meet with Monterey Park to complete the transition plan, including confirming:

- Key personnel
- Timelines for completion of audits
- Roles and responsibilities
- Hiring as needed
- Compliance with all milestones

We will also set up a schedule for weekly (or more frequent) meetings to check progress and resolve any issues and concerns throughout the transition period. As the current operator of the Spirit Bus Fixed Route services, we foresee no concern in the continuation of our operation, and the transition of services to the new contract.

TRANSITION AND START-UP ACTIVITIES

As the current provider, First Transit's transition activities focus on a review of our service with the new contract term. Our transition plans include items such as reviewing our current policies and procedures, auditing our operations, and setting goals and objectives for continuous improvement in the future. Based upon the information provided in the RFP, as well as our long-term experience with and understanding of the services, we have included a schedule for the transition of the new contract.

As the project transitions to the new contract, we will produce a task-by-task transition plan that reflects any changes in coordination with Monterey Park. First Transit foresees no problems in



the transition to a new contract within human resources, accounting, safety/security, labor relations, facility management, asset management, or administration.

Please see our Attachments section for a detailed schedule of these activities.

B. FACILITIES LOCATION

Describe the facilities from which each function of this service will operate, including office space, maintenance, dispatching, driver's area, vehicle storage, fueling facilities, etc.

First Transit will continue to operate the Spirit Bus service from its facility at 4337 Rowland Avenue in El Monte.

Located less than seven miles from Monterey Park City Hall, and just one mile north of the 10, our El Monte location provides nearly 6,500 square feet of office, service, and storage space.

The facility houses operations for the City of Monterey Park, the City of Arcadia, the City of San Gabriel, and the City of Sierra Madre. This sharing of facilities and resources has benefits both economic and operational.

Within its main building, the facility houses five offices, each with a desk, networked computer, landline phone, and adequate filing space. Our General Manager, Operations & Safety Manager, Maintenance Manager, Road Supervisor, and Administrative Clerk all have dedicated office space within the facility.



The dispatch area is located centrally within the office space to allow constant clear communication with all team members, and quick easy access for drivers. There is seating and computer stations for four dispatchers, and one lead dispatcher. Also contained within this “bullpen” configuration is the filing station at which drivers submit and retrieve their assignments, logs, and other documentation.

With a total lot size of nearly 44,000 square feet, our El Monte location has excess vehicle parking capacity. There are 40 parking spaces designated for revenue buses and shuttles, and



20 for non-revenue cars. Buses are cleaned in the dedicated wash bay located centrally in the parking area.

Over 2,500 square feet of this location is dedicated to garage space, which houses all parts, tools, and supplies for our technicians to work in the facility's two service bays.



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ADMINISTRATION PLAN

Describe the procedures that will be established to administer the transit program. This section must specifically include, at a minimum, the following information:

A. COMMUNICATION PLAN

Provide a description of the monthly reports that will be provided to the City. Describe the process to be used to capture, maintain, and produce reports with the data requested by the City for this project. Discuss what information will be communicated immediately, weekly, and monthly. Discuss the process used to investigate complaints and the potential follow-up actions that may be taken to ensure problems are not likely to occur again. Discuss methods to be used to maintain solid communication within the organization, including the maintenance of personnel records and communication of rules, procedures, and other information drivers are required to possess to ensure the quality delivery of service.

OPERATIONS TRANSPARENCY

In our relationship with customers, First Transit is committed to full and prompt reporting of all relevant information about operations, labor issues, performance metrics, response to complaints, service, and delivery.

In partnership with Monterey Park, First Transit will continue to manage all services with complete transparency. We make all information available to Monterey Park as requested and work together to see the transit system grow and strengthen. We welcome the opportunity to develop an annual agenda of goals and objectives to address Monterey Park's priorities, and to report progress in achieving those goals.

We understand that Monterey Park wishes to administer and provide oversight to this contract, and we will continue to do everything in our power to facilitate successful service to you. Our reporting and quality control procedures, including **Dashboard**, equip First Transit and Monterey Park with the information needed to successfully monitor this contract, celebrate our successes, and create plans for areas of improvement.

Frequent and regular communications with customers, on both a formal and informal basis, is fundamental to First Transit's business philosophy. As such, First Transit will continue to provide the City a monthly operations report at the time of monthly invoicing, offering basic information on key metrics such as ridership, miles of service, service reliability, and passenger complaints. We fully support Monterey Park's service initiatives and strive to exceed your standards for key performance indicators daily.

First Transit will continue to work with Monterey Park staff to refine performance information and reports in a format you need to meet both Monterey Park and DOT needs.



MANAGEMENT INFORMATION DASHBOARD

First Transit's local management and regional/corporate support teams are better informed than ever, with close to real-time, detailed, graphical information on their locations at their fingertips. First Transit's proprietary Management



Information Dashboard provides a centralized repository of field operational data and the ability to display Key Performance Indicators (KPIs) for local management, district managers, regional vice presidents, and senior management in a user-friendly interface.

Providing our managers with the ability to truly know the current and historical status of their operations results in the ability to address issues quickly and more completely. The Dashboard allows management to make better and more informed decisions on the day-to-day operations of their systems, as well as plan for long-term operational improvements.

FUNCTIONALITY

The Landing Page serves as an overview of the system's status and contains a summary of Key Performance Indicators for the selected location, including color-coded actual values, budget numbers and goals. Managers can personalize areas of importance to their



location for immediate access to statistics on issues that are important to the management of their specific operation. From the landing page, managers can navigate easily to more specific, detailed reports, such as the maintenance report pictured below. With the Dashboard current and historical information can be viewed conveniently and easily.

LOADING DATA

First Transit's Dashboard system was designed to provide flexibility. Operational data can be derived automatically from other existing systems, such as our FirstBase maintenance information system and payroll system. When automatic sources are not available, information may also be manually entered into the system.



Data is loaded automatically at a frequency consistent with the source. For example, information that is updated monthly will not be uploaded in real time. Manual loads have a built-in approval process that allows for management approval prior to being published for reporting.

FIRST TRANSIT REPORTS

First Transit provides a variety of standard and customized reporting options to best meet Monterey Park's needs, while the addition of DoubleMap technology expands even further the scope of reporting available.

DOUBLEMAP REPORTING CAPABILITIES

DoubleMap is capable of the following reporting functions:

- On-time by hour
- On-time by operator
- On-time by daily pullouts and routes
- On-time return to yard report
- On-time performance exception

The DoubleMap reporting module provides an extensive collection of management reports. All reports are accessible through a web browser interface for viewing and accessing historical information in the internal database. The reports allow managers to gain greater insight and control over their plans, schedules and communications. For each report, the system presents a web page so that agency staff can access the system anyplace and anytime they have access to the Internet.

DoubleMap reports will enable managers to improve a number of performance factors, including schedule adherence and headway management. For instance, schedule adherence reports will allow managers to maximize on-time performance and provide the ability to drill down through multiple layers of data to get at the root cause of scheduling problems. Administrators can also look for patterns over a period of time or performance at a specific time. These tools are helpful for improving existing routes as well as planning future routes.

Reporting tools are available to facilitate the generation of performance metrics, analysis of daily operations, and long-term planning. **DoubleMap is also able to offer one-click GTFS data, as well as GTFS data export, allowing agencies to easily enter data into the NTD Databases.**



GTFS download

Agency URL	http://ecat.doublemap.com
Season	Summer 2018
DOWNLOAD	

One-Click GTFS Export

Once a report has been generated, the user is able to quickly export it to an alternative format. These formats include Printable, Plain Text, and CSV Spread Sheet, which are useful for data analysis or distribution via electronic mail.

Please see our Attachments section for more details and samples of these reports.

STANDARD REPORTING

Below is a sample list of reports available currently:

Passenger Information	
Data	Telephone comments, complaints, commendations, and requests
Method	PC and database organization
Reports	Sorted by driver, safety comments, ADA comments, equipment comments, new/expanded service requests, schedule modification requests, customer information (name, address, telephone number, interest area).
Notes	Supervisors and dispatchers record telephone and written comments on a customer comment sheet for subsequent input to the database.

Passenger Counts	
Data	Passenger boarding by zip code and trip type
Method	Driver manifests, computer generated report requests
Reports	Summation submitted with billing



FTA National Transit Database	
Data	Service supplied and consumed as measured by passenger miles
Method	Random selection of vehicle method using form C.2710.2A
Reports	As required by the FTA
Notes	We compile this information for transit systems nationwide and will do so for Monterey Park's FTA reporting requirements, if applicable. Daily statistics and financial data will be maintained in our computer systems to ensure that demand-response financial and operating statistics are segregated. This provides an accurate reflection of eligible reimbursable items and expenses.

Automated Maintenance Record Keeping	
Data	Comprehensive garage and maintenance data requirements including preventive maintenance cycles and completions, vehicle maintenance history items, labor hours, and fluids consumption.
Method	Proprietary FirstBase maintenance software
Reports	Monthly summary of collected data
Notes	FirstBase reports are multi-layered and produce concise, complete data that assists line and management personnel in performing their duties. FirstBase creates required weekly and monthly reports.



Transportation and Supervision Records	
Data	Various elements related to service delivery
Method	Adept computerized reservations and scheduling software
Reports	Daily Operations Report is the primary summary report
Notes	Multiple records are generated throughout the day to help control and improve our delivery of service. Categories include dispatch log, communications record and service control information, supervisor reports on service and driver performance, conditions, accidents and incidents, discipline and commendations, and payroll exceptions. This information is summarized by the Operations & Safety Manager and is provided to management in a daily Operations Report. Hard copies of original data are retained for record keeping.

Safety and Training Record	
Data	Applicant/candidate files, completed training modules, driver qualification data and certificates, accident reports, retraining certifications, annual safety record evaluation, ongoing open BI/PD claims, and physical damage to buses.
Method	FirstBase and PC software, or camera system.
Reports	Monthly summary of collected data
Notes	Most of this information is retained in driver/employee permanent hard copy records that are managed by the safety and training manager. Accident files will be maintained in the safety department.

COMPLAINT RESOLUTION

Our goal is to resolve most customer concerns quickly and fairly. Almost all complaints are resolved within 24 hours of the initial call. However, more serious concerns may warrant a more in-depth investigation.

When customer complaints are received from the City, we initiate the following procedures to facilitate a fair and thorough resolution:



Complaint-Resolution Process	
General Manager's Involvement	The General Manager's role in complaint resolution is two-fold. First, the GM handles the timely resolution of all complaints, and serves as a liaison between our operations and the community. Second, the GM serves as a customer advocate during the process.
Initial Investigations	The Operations and Safety Manager, Juan Casillas, reviews pertinent manifest data, then interviews dispatchers, road supervisors, the vehicle operator, maintenance technicians, or other staff, as needed. Information is recorded, and the root cause(s) of the complaint is determined.
Additional Investigation	Based on additional facts that emerge from witness statements, the GM may initiate additional fact-finding efforts to resolve the complaint. Vehicle maintenance records and the driver's personnel file are reviewed, and all information is used in developing a resolution.
Exploration of Remedy	If a passenger complaint is the result of a preventable action on the part of an employee, the GM handles the appropriate re-training or disciplinary action. The complainant and Monterey Park staff are made aware of any remedies put into effect.
Discussion in Weekly Staff Meeting	The GM reviews the proposed resolution with all First Transit staff to ensure compliance with all service policies and procedures.
Resolution	Resolution occurs when the GM has determined that the cause of the problem is understood, the employees have acted to prevent the problem from recurring, and the City is satisfied it is resolved.
Re-Training	If a complaint is found to be the result of a preventable action on the part of an employee, re-training takes place. Concerns involving route operations are addressed and documented by our Road Supervisors. Concerns involving safety are addressed and documented by our Safety Manager. Concerns relating to vehicle maintenance are addressed and documented by our Maintenance Manager. In every instance, we make re-training a positive and productive experience for the employee. This creates a learning environment and increases the level of satisfactory employee performance in the future.
Evaluation	Complaints are reviewed, resolutions are discussed, and trends are evaluated at regular staff meetings. This helps us avoid the development of systemic problems in the future and ensures that



Complaint-Resolution Process

successful solutions adhere to First Transit and Monterey Park policies and procedures.

COMPLAINT RESOLUTION IN ACTION

When First Transit began operating shuttle services at the Los Angeles International Airport (LAX) in 2016, customer service complaints were higher than desired. The General Manager, First Transit Region Management, and the client sat down to discuss plans on how to resolve the number of complaints we were receiving. The General Manager investigated every single complaint filed, reaching out to the customer to understand the issue. He heard the comments of everyone involved and then viewed video footage from the Smart Drive system, ensuring a complete understanding of the event. Customers appreciated that First Transit was looking into their concerns and addressing them individually.

We saw a 96% reduction of customer complaints in under 24 months at our LAX operation. First Transit is proud to offer customer friendly service to all our passengers and clients.

The General Manager focused his attention on hiring the right people and training them in customer service. He realized that customer service trainings needed to be ongoing and began incorporating them into monthly staff meetings. First Transit staff also immersed themselves into the LAX culture to learn the intricacies of the airport and the service provided. Complaints quickly fell off once we understood those expectations and adjusted our operations to meet the needs of passengers.

In 2018, First Transit received only eight complaints, compared to more than 100 received in 2016.



B. ACCOUNTING PLAN

Describe the methods you will use to process invoices, payroll, and other financial data. Describe the checks in place to ensure the accurate, timely processing of invoices, payroll, and other financial data.

First Transit has extensive written procedures in place for the management of all accounting data, including payroll, accounts payable, and accounts receivable. We will fully incorporate Monterey Park requirements to deliver accounting data in a secure, timely manner.

Our General Manager, along with corporate accounting personnel, will handle all financial data that is processed on your behalf. Multiple levels of review and approval will help mitigate errors, making all accounting functions more accurate, efficient, and cost effective.

In general, accounting reviews are structured as follows:

- Operations source data is input by an administrative assistant working with the Operations Department
- Records are reviewed by the General Manager, regional staff, and corporate staff in the Cincinnati, Ohio corporate offices
- Review oversight is provided by regional and corporate staff, which approves invoices and reviews records and summary reports on a weekly, monthly, quarterly, and annual basis
- Our regional finance director will review accounts payables and receivables against budgets, forecasts, and industry best practices
- The maintenance manager oversees maintenance source data
- Our regional maintenance director will review maintenance items against budgets, forecasts, and industry best practices
- In addition to financial review, operations parameters are reviewed on weekly, monthly, quarterly, and annual basis as part of our quality control and quality assurance programs

PAYROLL PROCESSING

First Transit's payroll system follows detailed policies and procedures that follow all state and federal labor regulations and record keeping requirements. We will customize our payroll process as needed, based on requirements included in Monterey Park's contract.

Our payroll process includes the following steps:

- Employees swipe in via a timeclock at the beginning and end of each shift
- An hourly employee's time is tracked via the timeclock. Any adjustments are updated by dispatch and/or supervisory staff who monitor employee communications. All check-in and check-out times – including breaks – are recorded in the system, which is updated daily and can be printed weekly for each employee to review and sign
- Our automated payroll system can provide separate codes for straight time, overtime, vacation, sick pay, and unpaid leave. This allows multiple pay rates to be applied to



individual employees. Data is tracked and reviewed, hours are allocated accordingly, pay codes and pay rates are applied, and the payroll submission is made

- Cincinnati-based ADP payroll service is used for the issuance of employee payroll checks. The employee will receive a single check that includes both straight time and overtime hours. Employees can elect to receive printed payroll checks or have funds electronically deposited to their financial institutions using direct deposit. Regardless of their payroll preference, the employee's check (for the printed check option) or pay stub (for the direct deposit option) can be view via online employee self-service
- Our payroll service also submits an electronic report to each location to assist with payroll reporting. This document allows management to review the payroll for each employee and compare it to reports run locally from the payroll system. Management can determine if there are errors in the checks prior to payday and order corrected checks, so the employees receive the correct amount on payday
- Management staff reviews staff payroll weekly as part of key performance indicator review to determine whether regular and overtime hours are consistent with service parameters. Should an employee question any data on a paycheck, management staff will review the approved time to determine accuracy of each payment

ACCOUNTS PAYABLE/ACCOUNTS RECEIVABLE

Basic accounting functions – including accounts payable and accounts receivable – will be overseen by our management team, with quality audits performed at the regional and corporate level. Invoicing, accounts payable, and accounts receivable data is entered into our online accounting system. All accounts payable disbursements are processed by our corporate staff in Burlington, Ontario and Cincinnati, Ohio.

Our online accounting system allows us to:

- Record costs and produce invoices associated with authorized expenditures
- Report on subcontractor and vendor payments
- Track receipts from purchases of supplies and materials

ACCOUNTING TECHNOLOGY SUPPORT

Both local and corporate accounting personnel utilize a combination of flexible financial management software solutions. These include:

- JD Edwards – Accounts payable and receivable information is entered into this program for vendor check processing, financial reporting, and tracking and reporting on vendor expenditures.
- Hyperion – This software package enables financial planning, budgeting, and forecasting. We can integrate information from JD Edwards to develop detailed reports for analysis and periodic review, with the ability to segregate data by operational department.

- 
- **ADP**– This payroll solution enables the on-time delivery of checks and requested accounting reports. Additional benefits include:
 - Direct deposits to employees' banks
 - Payroll calculations based on unlimited earning and deduction categories
 - Off-cycle checks generation (for terminations or bonuses)
 - Worker's Compensation reports
 - **Human Resources Management Information Services (MIS)** – Additional human resources functions connected with safety management – including employee screening and training – are supported by our intranet-based Safety Resource Center.
 - **Enterprise HR** – ADP's Enterprise HR system helps us more effectively manage our employee information. With this system, our corporate objectives can more easily be aligned with our incentive programs, training, and compensation packages. Enterprise HR also includes:
 - Human Resources Management
 - Benefits Information Tracking
 - Employee Communication
 - Self Service for Employees and Managers
 - Security
 - Automated Payroll Processing
 - Payroll and Benefits Reporting



C. FARE COLLECTION

Describe your proposed method for collecting and accounting for cash fares.

First Transit knows the importance of accuracy and will provide detailed information to Monterey Park for all fare collection. Our monthly fare report details revenue collection and management data to include:

- Revenue collected (includes cash and other fare media)
- Revenue reconciled
- Daily deposits
- Daily cash summary sheets

Our revenue collection and reconciliation procedures minimize the potential for abuse, keeping operations accurate. If losses are identified during reconciliation, we act immediately to identify the source of the loss and apply appropriate measures to correct the situation.

Monterey Park's fare revenues are a crucial component of our operation. Fares will be charged to passengers as specified by Monterey Park. All revenues received are controlled and accounted for in accordance with standard cash handling, fare retrieval and accounting practices. We will ensure that all monies are transported to Monterey Park-designated bank facilities in a secure manner.

We regularly conduct audits throughout our revenue collection and management systems. These audits include:

- Operator sign-in – Driver accountability will be tracked and monitored throughout the farebox revenue collection process.
- Auxiliary farebox/Jammed farebox vaults – We closely monitor and review all procedures and controls concerning the handling of any farebox malfunctions.
- Security key control – Vault keys are inventoried and controlled at all times.
- Vaults accountability – All vehicles and vaults are accounted for through a detailed tracking process.

D. SUBSTANCE ABUSE TESTING

Describe the Substance Abuse Testing Program you have, or will have, in place. Drug-Free Workplace – Describe your plans for certifying that you promote a drug-free workplace. If possible, provide a copy of your current Drug-Free Workplace Policy.

We have a strict zero-tolerance policy about drug and alcohol abuse. Resources are available to any employee who seeks help or rehabilitation for substance abuse. Please see our Attachments for our formal Drug and Alcohol Policy.

Because we are trusted with the safety of our passengers and the community at large, we have adopted a drug and alcohol policy designed to:

- Create a work environment free from the adverse effects of drug and alcohol abuse
- Deter and detect employee abuse of illegal drugs and alcohol
- Prohibit the unlawful manufacture, distribution, dispensing, possession, or use of controlled substances
- Encourage employees to seek professional assistance any time personal problems, including drug or alcohol dependency, may adversely affect their ability to safely perform their assigned duties

DRUG TESTING

We use only authorized independent facilities to conduct our drug and alcohol testing. First Transit follows all FTA regulations as defined by 49 CFR Part 40 and 49 CFR Part 655. Safety-sensitive employees will be tested for the presence of illegal drugs under the following circumstances:

Drug Testing	
Pre-Employment, Post Offer Letter	Offers of employment with First Transit are contingent upon testing negative for use of illegal drugs. A negative drug result must be received before any candidate can be allowed to perform any job functions for the first time. Any employee returning from a leave of absence of ninety days or more must submit to a drug test prior to returning to their duties.
Random Testing	All employees are subject to random testing for illegal drugs. We test 50 percent of our safety-sensitive employees per the FTA regulations. We test 10 percent of our non-DOT employees monthly. Non-biased computer selections determine random tests. This may result in some employees being tested more often than once per year.



Reasonable Suspicion	We may decide to conduct a test for illegal drugs when a safety-sensitive employee's work performance, conduct, appearance, speech, or other behavior on the job creates a reasonable question of whether the employee is under the influence of illegal drugs.
Post-Accident	We require any safety-sensitive employee involved in a work-related vehicular accident, which meets the FTA's threshold for testing, to test for illegal drugs.

CONSEQUENCES FOR POSITIVE RESULTS

First Transit takes very seriously any infractions involving positive test results, as detailed below:

DRUG TESTS

If an employee tests positive for drug use, he or she will be notified by a medical review officer (MRO), a licensed physician with the knowledge and training to interpret and evaluate confirmed positive test results. The MRO will review the test results with the employee. Only after this review will the MRO contact us regarding the positive test result.

An employee who tests positive for drugs or alcohol is referred to a substance abuse professional for help. He or she is subject to termination under our zero-tolerance program, unless otherwise dictated by state law.

BREATH ALCOHOL TESTS

An employee who tests positive at a level of .02 or greater is subject to termination under our zero-tolerance program, unless otherwise dictated by state law. In the case of a positive test result, arrangements will be made to transport the employee home. If the employee insists on driving, he or she will be advised that the police will be contacted.

REFUSAL TO TEST

Any employee who refuses to submit to a drug or alcohol test is considered to have tested positive and will be subject to immediate termination, unless otherwise dictated by state law.

VOLUNTARY EMPLOYEE ASSISTANCE PROGRAM

We recognize alcohol and drug abuse as a treatable disease and encourage our employees to seek professional treatment, if applicable. We advise any employee seeking help of the resources available for evaluating and resolving problems associated with prohibited drug use and alcohol misuse.



We encourage our employees to participate in our company-sponsored employee assistance program (EAP). The EAP includes two voluntary programs:

COUNSELING AND REFERRAL PROGRAM

Regular full-time employees are eligible to participate in this program. It is designed to help an employee and his or her dependents deal with personal or family problems before they become overwhelming. Assistance is available for issues ranging from family or marital conflicts to substance abuse. We pay the full cost of an initial assessment and up to two counseling sessions. Additional sessions may be covered under the employee's medical plan.

SUBSTANCE ABUSE REHABILITATION PROGRAM

This program is available to regular full-time employees (excluding those employees covered under a collective bargaining contract or found to have violated this policy) with one full year of service with First Transit. The program is designed to help an employee correct or eliminate alcohol or drug-related performance problems.



E. HARASSMENT

Describe your plans for certifying that you will have a policy prohibiting all forms of harassment in the workplace. If possible, provide a copy of your current policy on harassment in the workplace.

First Transit is committed to providing equal employment opportunities and affirmative action initiatives. First Transit's policies include:

HARASSMENT

Harassment occurs when one individual interferes with, disrupts, or intimidates another person because of race, sex, religion, color, age, national origin, marital status, sexual orientation, gender identification, veteran status, disability, or other protected status. Examples of harassment include, but not limited to:

- Engaging in conduct that is offensive to the individual, such as sexual flirtation, kidding, teasing, making jokes of a sexual nature, or repeatedly asking for a date
- Making offensive physical contact such as touching, patting, pinching, grabbing, brushing against another's body, or giving neck massages
- Requesting sexual favors and taking, threatening, or refusing personnel action based on an employee's submission to or refusal of a sexual overture (even if no personnel actions are taken)
- Displaying pictures, posters, calendars, graffiti, objects, promotional materials, reading materials, or other materials that are sexually suggestive, demeaning, or pornographic, or bringing into the work environment or possessing any such materials to read, display or view at work
- Engaging in continued or repeated verbal abuse or making sexual innuendos
- Making comments of a sexual nature about an individual's body
- Making suggestive, obscene, or insulting gestures and sounds
- Making jokes that refer to race, religion, color, age, national origin, marital status, sexual orientation, gender identification, veteran status, disability or other protected status
- Posting or distributing cartoons, drawings or any other material that negatively reflects on a person's race, religion, color, age, national origin, marital status, sexual orientation, gender identification, veteran status, disability, or other protected status
- Using epithets, slurs, negative stereotyping, or other offensive language
- Engaging in practical jokes, horseplay or teasing that makes fun of or insults a person's race, religion, color, age, national origin, marital status, sexual orientation, gender identification, veteran status, disability, or other protected status

First Transit's human resources department handles providing managers and supervisors with the proper training to respond to reports of harassment, discrimination, and retaliation. If a manager or supervisor receives a complaint of this nature, he or she must immediately report the conduct to human resources. If it is determined that harassment, discrimination, or



retaliation has occurred, we will take reasonable disciplinary actions against the offending party, up to and including discharge.

EQUAL EMPLOYMENT OPPORTUNITY (EEO) POLICY

First Transit is committed to providing equal employment opportunities and affirmative action initiatives. First Transit's EEO practices include the following policies:

- **Harassment Free Workplace:** First Transit has “zero tolerance” for any form of harassment, and unintentional and careless acts that may contribute to creating a hostile environment for some employees.
- **Affirmative Action for the Disabled and Veterans:** We have a commitment to provide a work environment that promotes diversity through employment, career advancement and other business opportunities. First Transit encourages qualified disabled individuals, special disabled veterans and Vietnam Era Veterans to seek career and business opportunities.
- **Equal Employment Opportunity and Non-Discrimination:** First Transit's recruitment, choice, placement, promotion, training, compensation, participation in social and recreational programs and continued employment is based on a person's ability as related to valid job requirements, without regard to race, color, religion, age, gender, sexual orientation, gender identification, national origin, ancestry, veteran status or disability. FirstGroup America's policy prohibits discrimination based on bona fide disabilities as such pertain to the American with Disabilities Act (ADA) of 1990 or any other criterion that could be discriminatory.
- **Anti-Discrimination, Harassment, & Retaliation Policy:** First Transit expressly prohibits any form of discrimination and/or harassment based on race, sex, religion, color, age, national origin, marital status, sexual orientation, gender identification, veteran status, disability, or other protected status. We further prohibit retaliation against any employee who raises a good faith concern about any such conduct.

Our EEO, Affirmative Action, Anti-Discrimination policies outline clear procedures for reporting, record-keeping, responding to violations, and anti-retaliation policies.



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OPERATIONS PLAN

Describe the procedures that will be established to operate the transit program. This section must specifically include, at a minimum, the following information:

A. SERVICES PLAN

Describe the services the Proposer will provide. Details for each service are provided in the Scope of Services section of this RFP.

First Transit defines quality service as safe, efficient, and on-time transportation services performed by drivers who are well-trained and focused on the customer. Throughout our daily operation for Monterey Park, we will continue to incorporate the proven approaches and solutions to provide the highest quality of service every day. Customer satisfaction—both the passengers we serve and the City as our customer—are the evaluators by which we will determine our success in this area.

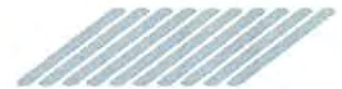
While First Transit offers the security and resources of a large, global transportation company, we act locally as independent businesses. We collaborate with communities, clients, customers, and staff to build relationships, and to constantly improve your Fixed Route system. First Transit understands the pride and ownership you feel for the success of the Spirit Bus.

Monterey Park can be confident of First Transit’s dedication to provide value added transportation solutions while working to exceed productivity goals and provide system wide efficiencies.

Contractor’s Responsibilities	Our Compliance and Location of Further Details
Reporting	First Transit provides a variety of standard and customized reporting options to best meet Monterey Park’s needs, while the addition of DoubleMap technology expands even further the scope of reporting available. Please see our First Transit Reports section within our Administration Plan for more information about our wide range of reporting capabilities.
Vehicles	First Transit makes every effort to ensure that all vehicles we maintain for Monterey Park meet or exceed all state and federal codes, regulations, and standards. Please see California Highway Patrol (CHP) Inspections within the Experience & References section, as well as our Attachments, to learn more.



	First Transit is a proud member of the California DMV Pull Notice Program. Please see our Attachments section for proof of our participation.
Vehicle Cameras	First Transit is pleased to propose the implementation of DriveCam SF64 for video and audio monitoring of Monterey Park buses. Please see Technology Solutions for Monterey Park within Project Understanding, Section I of our Operations Plan, and Section A of our Administration Plan for more details.
Vehicle Tracking Technology	DoubleMap technology for real-time vehicle tracking so dispatchers, supervisors, and customers know exactly where the vehicles are located at all times. Please see Technology Solutions for Monterey Park within Project Understanding, for more details.
Operations, Dispatch, and Maintenance Facility	The First Transit location in El Monte, located less than seven miles from Monterey Park City Hall, includes adequate space for all office and maintenance activities, and provides secure storage for all vehicles. Please see Section B of our Start-up Plan for more details on this facility.
Office Equipment and Computer System	Our location provides all resources necessary for personnel to perform their assigned duties, including a computer network, and a landline phone with a dedicated number and voicemail. Please refer to Section B of our Start-up Plan for more information.
Maintenance Standards	First Transit commits to continuing to provide the highest standards of maintenance and repair for Monterey Park vehicles. Please see our Maintenance Plan section for more information.
Maintenance Plan	At First Transit, we take immense pride in our well-earned reputation for high-quality vehicle maintenance and our commitment to enhancing the safety, reliability, and cost effectiveness of our operations by taking excellent care of the fleets we service. Please see our Maintenance Plan section for more information.
Farebox Equipment	First Transit will continue to use the City-provided diamond-style fareboxes, and TAP Card readers within the new contract. Please see Section C of our Administration Plan for more details on how we handle your fares.



Invoices	First Transit will continue to provide on the tenth of each month an invoice for the previous month's Fixed Route services rendered less all farebox receipts. A report will accompany the invoice that will include, but will not be limited to, the following statistics: A. Total number of fares collected B. Number of passengers carried per trip, per day, per route, and monthly totals C. Actual vehicle service hours of operation per day, per route D. Charter Service billing hours, if applicable E. Responses to customer concerns submitted by the City of Monterey Park F. The amount of any deductions will be calculated by Contractor and a written explanation must accompany the invoice Other operational reports will be available to the City upon request. Please refer to Section A of our Administration Plan for more detail on our reporting solutions.
Personnel	First Transit will continue to be responsible for every aspect of personnel management, including but not limited to: A. Performance standards B. Wages and benefits C. Liability, workers' compensation, unemployment insurance, and Social Security D. Claims, costs, and expenses arising from alleged violations of personnel practices We agree to allow the City to demand removal from the project, for reasonable cause, any personnel, and to notify the City of any personnel changes. First Transit does not discriminate on any basis when hiring employees. Please see Section H of our Operations Plan for information about our workforce management. Please see Section E of our Administration Plan for details on our non-discrimination policies. Please see Section C of our Operations Plan for our local organizational structure. We provide world-class start-up and ongoing training to all personnel. Please see Section E of our Operations Plan for more details.



	Because First Transit is trusted with the safety of our passengers and the community at large, we have adopted policies designed to create a work environment free from drug and alcohol abuse. Please see Section D of our Administration Plan, as well as our Attachments section, for details. Please see Section C of our Administration Plan, Section B of our Operations Plan, as well as our Proposed Staffing spreadsheet in our Required Materials for information on our highly-qualified Fixed Route staff.
Employee Safety and Training	All new First Transit drivers receive a minimum of 62 hours of training, including Classroom, one on one Behind the Wheel, and Cadet-in-Revenue training. We are confident that our employee training programs meet or exceed Monterey Park's requirements. Please see Section E of our Operations plan for more details.
Dress Code	The appearance of our staff has a direct impact on the image of First Transit and Monterey Park, which is why we expect that all employees in all positions present a professional image. Please see Section H of our Operations Plan for more information about our dress code.
Accounting	First Transit will record all costs incurred in the performance of this contract in an account separate from those used for our other business activities. Our books will be available for inspection at all times, including for an annual program audit, at no cost to the City. Please see Section B of our Accounting Plan for more information.
Accidents, Injuries, and Incidents	First Transit will notify City Management within one hour of any vehicle accidents, passenger accidents/injuries, or any major incidents, including confrontations with passengers. We will also provide detailed incident reports in writing to City Management by the close of the next business day. Please see Section G of our Operations Plan for more information on how we handle incidents such as these.
Lost and Found	First Transit will maintain a "lost and found" service for items left on the vehicles and will notify City Management of any found items.
Insurance	First Transit will maintain insurance in conformance with City requirements. Please see proof of insurance adequacy within our Required Materials section



Fare Collection and Accountability	Please see Section C of our Administration plan for more details on how we handle your fares.
Performance Management	As the incumbent Contractor, First Transit remains committed to providing a superior transportation experience to our shared riders of the Spirit Bus. We invite the City to assess our performance in ways, including: A. Riding or randomly checking our service and reporting all problems, concerns, and aspects of the service. B. Randomly sampling our trips to analyze on-time performance, trip time, passenger treatment, and vehicle condition and cleanliness. C. Reviewing and verifying daily, weekly, and monthly operating invoices, trip sheets, and statistics provided by us. D. Subjecting vehicles to inspection (within reasonable notice). First Transit is responsible for the proper operation and maintenance of all wheelchair lifts/ramps, and vehicle operators will promptly arrange and report solutions in the event of failure. Our vehicle operators will also report all passenger incidents to their supervisor, who will use her best judgement in rectifying the situation. Barring unusual weather or traffic conditions, unavoidable vehicle malfunctions, and/or naturally occurring disasters, First Transit will provide timely service. As detailed in the Looking Ahead section of this proposal, our General Manager at our location in El Monte, Brent Johnson, will hold regular operations meetings with Monterey Park staff to give updates, discuss concerns, and plan continued success.
Fixed Route Penalties	As the incumbent Contractor, First Transit will remain vigilant in providing exceptional service to our shared riders of the Spirit Bus. As such, we agree to the schedule set forth by the City.



B. MANAGEMENT PLAN

List the Project Manager for this project and describe what unique abilities he/she brings to the project. Include a detailed resume of each management team member which lists their professional experience and length of time at each assignment including the length of time with the Proposer's organization.

MONTEREY PARK LOCAL MANAGEMENT TEAM

The key to any successful operation is an experienced, motivated, and high-performing management team. As the incumbent provider of these important transportation service, First Transit's successful management team is already in place, and offers knowledge, experience, and stability that none of our competitors can match.

Our management team brings proven knowledge of the transit industry and the service area, experience leading successful organizations, including Monterey Park, and the energy and passion for delivering efficient operations. A representative from the management team will always be on call to respond to Monterey Park's concerns or emergencies, ensuring proactive and responsive service 24 hours a day.

Please see our Attachments section for résumés for these key personnel.

BRENT JOHNSON, GENERAL MANAGER

First Transit is very proud to propose that Brent Johnson continue in his position as General Manager. An inspirational leader and effective manager, Brent has led Monterey Park for the last several months and has already proven to be an effective and results-driven leader for the City's fixed route services.

Brent has been in transportation for over 12 years, all of which were in California, and has managed fleets with as many as 115 buses. In previous roles, he improved On-time Performance (OTP) by 6%, reduced customer complaints by 20%, and increased operational efficiency by implementing new run cuts.



"Our approach is rooted in long-term partnerships with public authorities in the relentless pursuit of the safest, best quality and most innovative mobility solutions."
—Brent Johnson, General Manager, First Transit's El Monte, CA location

RESPONSIBILITIES

Brent's primary responsibilities include the following:

- Primary Contact – Brent Johnson will continue to serve as the primary contact for Monterey Park.
- Performance Management of Personnel – He will still handle the performance of the managers, contract compliance, and all operators, dispatchers, reservationists, maintenance workers, drivers and all other personnel who serve Monterey Park.
- Employee Relations – He will remain focused on talent recruiting, hiring, employee retention, motivation, labor relations, and work force planning and allocation.
- Operational Oversight – Brent's responsibilities for successful operations, supporting corporate policies and procedures, reporting on expenses and revenues, managing all assets, checking service, and performance goals will continue.
- Operational Data – He will have ongoing support from the Region Vice President, Jay Jeter, to supply all operational data to the City for complete operating transparency.
- Safety and Security – Brent will continue to handle the safety and security of passengers, employees, fleet, and facilities by assuring that standards for safety, customer service, and professionalism are maintained throughout the location. This includes proper fleet and facility maintenance and repair.
- Regulatory Compliance – He will uphold all governmental regulations, and compliance with local, regional, state, and federal established standards and procedures.
- Community Relations – With help from Region Vice President, Jay Jeter, and First Transit's Senior Vice President, Fadi Chakbazof, the General Manager, Brent, will continue to keep a positive community presence and handle all community outreach activities. He stands ready to respond to any issues related to service delivery.

Led by Brent, First Transit's management team handles promoting and supporting effective communications throughout the local staff in the following ways:

- Lines of authority are defined
- Proper resources will be distributed to maintain a high level of employee performance
- Employee expectations will be set up and agreed upon
- Conduct performance reviews to measure employees' progress toward goals
- Have open channels of communication throughout the organization

Brent will continue to have designated managers in operations, maintenance, driver development and safety, passenger service/community engagement, sustainable environmental services, accounting, and human resources.



JUAN CASILLAS, OPERATIONS & SAFETY MANAGER

First Transit is pleased to propose that Juan Casillas continue in his role as Operations & Safety Manager. He has been in transportation, and at our El Monte location specifically, for over five years. Juan has hands-on experience as a driver, a dispatcher, and a supervisor. He brings that experience to leading his team every day.



Juan will continue to handle all transportation activities, including oversight of dispatching vehicles on schedule, driver operation, supervision while in service, and the accuracy of data collection and reporting. In support of the general manager he will monitor and evaluate all activities to promote successful operation and full compliance with Monterey Park requirements.

Juan will also continue to oversee all aspects of operator training, and will continue to conduct regularly scheduled safety meetings with maintenance and operations personnel, and fleet operators.

“One of the many things that I love about my job is the vision and direction of our new team. I am proud to be a part of a results-based team...a team that finds solutions.”
—Juan Casillas, Operations & Safety Manager, First Transit’s El Monte, CA location

RESPONSIBILITIES

Juan’s primary responsibilities will continue to include the following:

- **Management Support** – Juan is accountable to our General Manager for the quality of service delivery and supports Brent with daily operational activities. Develops labor requirements for Dispatchers, Operators, and Reservations Personnel.
- **Operational Oversight** – Juan checks and evaluates operations activities including on time performance, missed runs, revenue/cost data, total work hours, total pay hours, customer compliant data, accident data, road call data, and other operations related functions.
- **Safety and Security** – Offers direct operational oversight to deliver safe and reliable operations for Monterey Park with our reservations, dispatch, and operating personnel delivering passenger satisfaction. He coordinates with administrative staff for the drug and alcohol testing program, and training/personnel file administration. He develops and implements our Safety Action Plan; chairs the Safety Solutions Team; conducts monthly safety meetings; conducts observed and unobserved ride checks; reviews accidents and incidents with operators; and assigns refresher training or recommend disciplinary action. Juan gathers information, investigates, and reports on safety, accident, and Worker’s Compensation issues.

- Employee Relations – Juan supervises recruiting efforts; conducts reference checks and DMV verification for prospective employees; processes and trains new hires; oversees physicals and drug/alcohol testing; monitors credentials and licenses.
- Customer Service – He will continue to ensure that Monterey Park services are operated in a safe, reliable, and prompt manner, and will conduct semi-annual location audits to sustain performance standards.

MIGUEL MORENO, MAINTENANCE MANAGER

First Transit is also very pleased to propose that Miguel Moreno continue as Maintenance Manager for Monterey Park services. Miguel has over 17 years of maintenance experience in California.

He began his transit maintenance career as a bus technician, performing inspections, preventative maintenance, and increasingly complex repairs. He has taken that hands-on experience and applied it to fleet maintenance management. Miguel has utilized his extensive CNG experience to ensure exceptional maintenance for Monterey Park, helping extend the life of the fleet.



Miguel will continue to provide direct maintenance management oversight for Monterey Park. He will continue to handle all fleet maintenance, repair, and cleaning activities, along with personnel management, safety, and security oversight, Monterey Park asset control, parts inventory, and implementation of suggestions for continuous process improvements.

RESPONSIBILITIES

Miguel's primary responsibilities will continue to include the following:

- Employee Relations – Miguel is still directly involved in the recruitment, hiring, training, evaluation, and supervision of all maintenance personnel; and supports an adequate workforce to ensure that the department runs effectively and efficiently.
- Operational Oversight – He will schedule and distribute all fleet and facility maintenance resources including preventive maintenance, repairs, troubleshooting, and cleaning programs; develop periodic or seasonal maintenance campaigns as needed; maintain parts and fluids inventory; coordinate maintenance subcontracts; and maintain accurate maintenance records.
- Safety and Security – Miguel ensures compliance with Monterey Park and First Transit Preventive Maintenance (PM) Programs and safety inspection schedules; manage shop safety programs; perform safety inspections; oversee the security of vehicles, tools, equipment, buildings, fuel, parts, fares, and all other system assets; and coordinate with law enforcement, fire, and other safety-related agencies to ensure security and regulatory compliance



- Continuous Improvement – He will continue to attend or arrange seminars and training sessions, as needed; suggest process improvements based on maintenance data; work with bus manufacturers, equipment suppliers and other maintenance professionals to understand industry best practices; and implement improvements to manage an effective bus maintenance shop.

MONTEREY PARK REGION MANAGEMENT TEAM

Supporting Monterey Park is First Transit's Region Management Team. These diverse and highly qualified individuals provide experienced support throughout the operation, including the areas of safety, training, maintenance, administration, accounting, insurance claims management, and human resources and ensure your satisfaction with our service delivery.

FADI CHAKBAZOF, SENIOR VICE PRESIDENT

Fadi has an impressive record of delivering operational excellence and innovative solutions for transit agencies. He brings with him more than 17 years of transportation experience in areas such as operations, finance, legal, labor negotiations and customer engagement.

He earned his bachelor's degree in business administration from the University of Southern California and a juris doctorate from Western State University College of Law.



Fadi works closely with the region staff to ensure quality service at the location. He leads the region team by demonstrating a strong sense of First Transit's mission, vision, and values. Fadi develops region management for success in client relations, performance, and operations.

JAY JETER, REGION VICE PRESIDENT

As Region Vice President, Jay brings with him more than 18 years of transit experience. He has a proven record of accomplishment when it comes to location's operations, finance, legal responsibilities, labor and union negotiations, customer engagement, and employee leadership. Jay develops the management team and supervises the operation through site visits, conference calls, reports, and budget reviews.



He earned his bachelor's degree in public administration from the University of San Francisco and has a transit and paratransit management certificate from Pepperdine University.

Jay works closely with all the region management members to maintain quality service and client satisfaction. He handles the hiring and training of new managers at the location level. Jay is a valuable resource should any operational issue arise

DAX SIKES, REGION DIRECTOR OF OPERATIONS

Dax Sikes provides consistent support as the Director of Operations for Monterey Park. Dax has over six years management experience, including relationship management with municipalities, management of rolling stock, and focus on the metrics that drive performance in business. As Director of Operations, he provides operation, planning, and administrative support. Dax is also responsible for budget preparation and project staffing levels. Dax is based in Tempe, AZ.



Dax works closely with our General Manager to provide assistance in all facets of the operation. He is involved in the training and recruiting efforts of our location. Dax assists the location with operation issues and will find ways to prevent similar occurrences.

MAUREEN JACOBSON, VICE PRESIDENT OF FINANCE

As Vice President of Finance, Maureen provides management reporting and analyses of all financial and operating data for our Central and Western Region locations. Maureen handles all financial reporting and analysis, operational and financial controls, forecasting and budgeting, process efficiencies and overall financial oversight on day to day operations. She has over 25 years of finance experience in the transit industry and earned her degree in accounting and finance at San Diego State University.



Maureen monitors expenses and reports across the region looking for financial trends. She works closely with region and location staff to implement profitability strategies to exceed First Transit and Monterey Park company standards.

SCOTT HANSEN, DIRECTOR OF MAINTENANCE

Scott has more than 27 years of experience in bus fleet maintenance, including paratransit, fixed route, and school bus fleets. He provides oversight of region maintenance functions in the Western U.S. and Western Canada. In his role, Scott carefully monitors maintenance expenses, maintenance standards, repair efficiencies, maintenance training programs, and budget preparation. He is currently responsible for more than 2,700 vehicles.



Scott works closely with the Region Maintenance Manager, and is a valued resource should any maintenance issue arises. He monitors maintenance trends and looks for ways to pass cost savings on to the client.



DOUG MONTEZ, REGION MAINTENANCE MANAGER

Doug has more than 30 years of experience in fleet maintenance with the last 15 of those years in a management role. His current role at First Transit has him providing support for the vehicles in the West Regions. He works closely with each location to exceed all maintenance standards. Doug trains all new maintenance managers as well as implements and assists locations in keeping up with all new fleet maintenance standards and regulations; including California Environmental policies.



Doug works closely with the on-site Maintenance Manager, including new manager onboarding and training. He monitors location maintenance trends and makes recommendations to local management and Monterey Park about corrective action regarding those trends.

PAUL MEREDITH, SENIOR DIRECTOR OF TRANSIT SAFETY

Paul has over 25 years of transportation management experience in regulatory compliance, training, and program development. He has also managed compliance operations dealing with state and federal regulations, including OSHA, EPA, and drug and alcohol testing programs. Paul's primary responsibility is the management and coordination of safety compliance for First Transit. He leads a team of Region Safety Managers to ensure compliance with Federal, State, and Local regulations as well as upholding First Transit's standards. In addition, he coordinates the development of training programs and curriculum for our operating locations. Paul currently resides in DuBois, PA.



Paul works closely with the Region Safety Manager to develop and train local management in First Transit Safety policy and procedures. He provides additional support to the location for any safety related event or issue that may arise.

JENNIFER MCKIBBINS, REGION SAFETY MANAGER

Jennifer brings with her over 16 years of experience in safety and training holding certifications in OSHA, Transportation Safety Institute (TSI), World Safety Organization and FEMA. She provides support for our southwest region and is supported by First Transit's Senior Director of Transit Safety, Paul Meredith. Jennifer offers instructor certification training for classroom and behind the wheel instructors, including TSI instruction. She ensures that our operations follow all applicable DOT and First Transit policies and procedures. Jennifer provides excellent support for our on-site Safety Managers. She is based out of Las Vegas, NV



Jennifer works closely with our on-site Safety Manager; she assists with the training of local management and instructors at the location. She works closely with the General Manager and other region management if a safety event occurs to perform a proper investigation of the incident.

KIM MINGO, SENIOR DIRECTOR HUMAN RESOURCES

Kim provides direction for human resources and labor relations for the western region (16 states) for First Transit. She has worked in this current position for the last 9 years with First Transit and has over 17 years of experience in employment and labor relations. She collaborates with various senior management to develop and implement effective labor relations and employee relation strategies. In her role, Kim monitors the implementation and administration of employee recruitment and retention programs, management development and training programs in compliance with First Transit policies. Kim is based in Vancouver, WA.



Kim works closely with the Region Human Resources Manager to provide additional support for any complaints or issues that may arise. She also plays an active role in the training programs for local management and staff.

DARIUS SLATTON, REGION HUMAN RESOURCES MANAGER

Darius Slatton is based out of the greater Los Angeles area and provides support for the western region. He joined First Transit recently bringing with him over 12 years of human resources experience. In his current role, Darius provides support for labor and employee relations. He monitors all investigations that arise from customer and employee complaints and grievances. Darius is directly involved with the development and training of local management and works with each location to focus on their specific employee recruiting and retention needs.



Darius makes periodic visits to Monterey Park's operations to evaluate local teams and help them work through any issues related to procedural or legal compliance.

CORPORATE SUPPORT

First Transit provides our local management teams with expert support by both regional and corporate staff. Monterey Park's management and regional staff are provided corporate oversight with all operations and maintenance functions by the following support staff.



STAFF

First Transit's corporate support team, led by President Bradley Thomas, provides corporate oversight in all areas of our operations, including safety, maintenance, and finance. This layer of additional support for our locations allows our local management teams to focus on the day-to-day tasks of overseeing the Monterey Park operations while our experienced corporate team provides knowledgeable and experienced support with important background projects, such as tax documents, labor negotiations, and the continual improvement of our operations that our customers come to expect from First Transit.

Our corporate support is comprised of professionals who not only are leaders in their functional areas, but many of whom developed their understanding in transit operations backgrounds. **Together, our corporate support team offers Monterey Park over 100 years of transit-industry experience.**

SUPPORT FUNCTIONS

Our corporate support team provides higher-level support to our operations through implementing best practices across their functional areas. President Bradley Thomas oversees the initiatives and directives of the corporate teams. The corporate support team provides the following support:



Accessible Leadership

"When I think of the culture of First Transit, the first word that comes to my mind is 'accessible.' I know that I can always call any staff member, be it the top leader or otherwise, and the individual will exhibit a level of responsiveness unmatched by any other company in this business."

Robin Chiarelli, Sun
Trolley, Fort Lauderdale,
FL



Functional Area	Corporate Support for the Local Management Team
Maintenance	Managing our maintenance quality assurance programs Implementing innovative methods to improve efficiency and bring accountability to our clients Provide technical assistance, training, and best-practice information to Monterey Park maintenance operations Environmental compliance, audits, and monitoring
Safety	Developing, recommending, and implementing safety policies and procedures for the organization Ensuring compliance with safety practices Establishing First Transit's safety targets and setting the plans to achieve them Corporate Communications support in emergency situations
Human Resources	Facilitating human resources strategy Developing workforce planning models and HR metrics Guiding employee relations, diversity, and career development Employee benefits
Finance	Performing budget analysis, forecasting and strategic planning Accounts payable/receivable
Labor Relations	Developing, recommending, and directing a positive, pro-active corporate labor policy Representing First Transit all labor relations matters, arbitrations, National Labor Relations Board cases, and collective bargaining



Legal	Ensuring policies and procedures comply with local, state, and federal requirements and guidelines Overseeing contract matters, labor and employment, OSHA compliance, FTA regulatory compliance, risk management and public procurement.
Innovation	Providing guidance on industry best practices to implement at locations

AREAS OF EXPERTISE

First Transit's corporate support extends to leveraging the best practices and talents among all of FirstGroup's divisions, including First Student, Greyhound, First Rail, and First Vehicle Services. Our strategy is to develop and share our global expertise for the benefit of Monterey Park. Our four Areas of Expertise (AoEs) were created to demonstrate this strategy on a large scale:

- **Employee Engagement:** Employee Engagement is a key area of concentration for us and that includes recruitment, training and communication. We work proactively with our managers on employee retention, engaging managers on understanding our employees are our best assets and providing them with the tools and best practices for retaining valuable employees.
- **Community Engagement:** First Transit provides our managers with the tools and training they need to grow and sustain trusting community relationships. We encourage our management teams to be involved in the communities in which we serve.
- **Consumer Engagement:** The Consumer Engagement AoE team focuses on engaging our current clients to ensure we are consistently offering innovation, service improvement ideas, and cost efficiencies.
- **Disciplined Operations:** Through standardization and optimization, Disciplined Operations strives to ensure the delivery of timely service to our customers every day, on every route. Disciplined Operations achieves its objective by evaluating and improving the processes that support service delivery and by providing our local management teams with training, best practice awareness, tools to facilitate root cause analysis of delays, mentoring sessions with region leaders, improvement planning, and centralized reporting capabilities.

Each AoE is led by a team of representatives from across the organization who identify and capture best practices among our FirstGroup locations, developing the means to share and deploy it to our management teams at our locations. These four AoEs are designed to provide



our clients with management teams who are engaged with the community, our clients, and our employees to provide overall positive impacts to service throughout the life of the contract.

IT SUPPORT

First Transit offers a robust support system for all technologies and systems implemented on the Monterey Park services. Our locations management teams benefit from our corporate support as well as the partnerships we have developed to add additional layers of support for maintaining the technology systems at Monterey Park.

PROACTIVE MONITORING

First Transit's corporate teams set up internal structures for the systems at our locations. When issues arise, the IT team is immediately alerted and assigned to resolve issues. This level of proactive monitoring allows First Transit's IT team to work with local IT teams to resolve issues before they affect service.

CORPORATE IT SUPPORT

First Transit offers corporate support teams who monitor, support, and troubleshoot issues for each of our operating locations. Our IT Corporate Support teams use the ITIL Process Model for service management, which focuses on aligning IT services with the needs of business. Our IT support offers three layers of incident management.

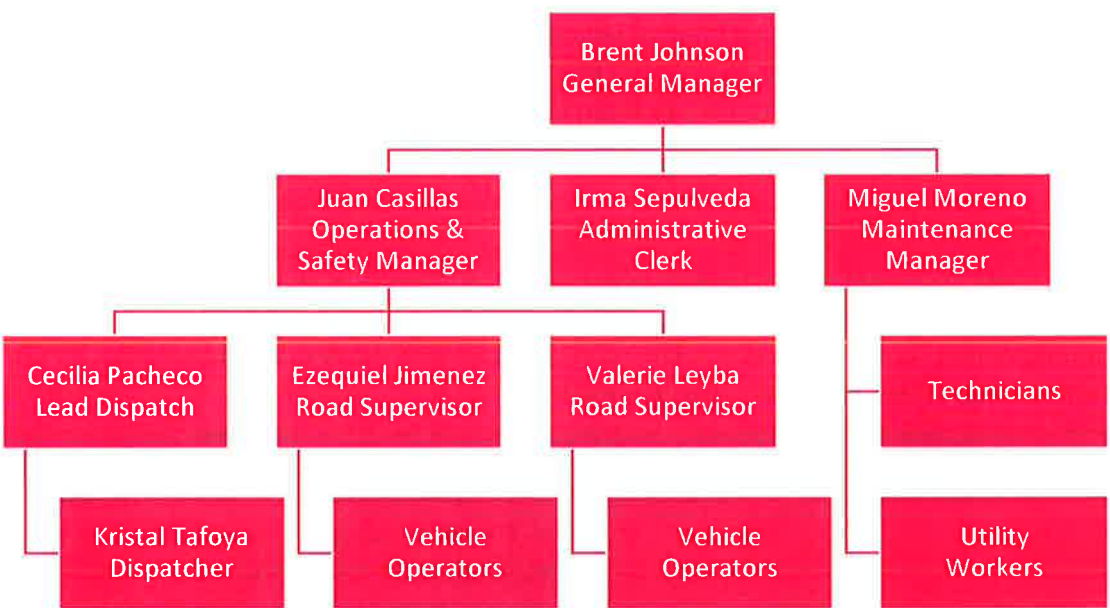
Level	Support
Level 1: Help Desk	First Transit's help desk provides customer-facing support to troubleshoot common problems (password resets, etc.) The Help Desk will route more technical problems to Level 2 for additional support
Level 2: Application	Subject Matter Experts (SMEs) and suppliers examine more complex issues to develop responses and solutions SMEs and Suppliers may work with Level 3 to craft solutions
Level 3: Development	Our developers work through system bugs and issues to maintain the efficiencies of the systems Developers communicate solutions to Level 2 and Level 1



C. STAFFING PLAN

Describe the functional responsibilities of each position. The plan should discuss minimum job requirements for each position, screening procedures, training requirements, on-going staff evaluation process, personnel contingency plans and the relationship among positions. The Proposer must describe how it intends to minimize staff turnover and ensure stability and continuity. Include labor rates for operators and mechanics. Indicate whether or not drivers and mechanics will be represented by a union.

ORGANIZATIONAL STRUCTURE



JOB DESCRIPTIONS

First Transit will provide a professional management team, operations staff, and support personnel to serve Monterey Park's complete transportation needs.

The following is a brief overview of each job description. Please see our Attachments section for full Job Descriptions.

Position	Responsibilities
General Manager	Complete oversight of operations, maintenance, safety, and administrative duties Primary liaison with customer Provide leadership and support for all project personnel



	Maintain strong safety culture and encourage continuous improvement Supervise the daily functions of the facility personnel Perform maintenance management functions as directed by contract Prepare maintenance reports and work order data for management and Monterey Park
Operations & Safety Manager	Safe, efficient, and successful service delivery Focus on achieving key performance indicators Customer service levels with operations and driver personnel Accident investigation and reporting Classroom training for vehicle operations, customer relations, passenger assistance, and defensive driving Behind-the-wheel training Coordinate safety meetings Monitor, coach, and support trainees to develop skills and experience in customer service, wheelchair tie downs, and driving
Road Supervisors	Communicate job requirements and responsibilities to drivers First-line supervisors for drivers, customer response, driver field evaluation and accident first-responders Observe drivers on the road, correct safety problems on the scene, document violations On-street presence and supervision for operators, passengers and public Assist dispatchers with on-time vehicle operations Advise operators and dispatchers of street conditions and hazards Immediate response to accidents, injuries and mechanical breakdowns Work with dispatch staff, clients, and First Transit drivers to ensure consistent service delivery Pull Farebox vaults
Administrative Clerk	Facilitate business information and administrative activities in support of management personnel Prepare financial and statistical data Payroll and benefits administration



	Timely, accurate collection and reporting of service data, including DoubleMap output and other required reports Clerical and administrative duties to ensure that all contractual and legal mandates are met Maintain contract files and records Prepare contract correspondence, manager reports, meeting agendas, and schedule appointments and meetings for management Verify all driver hours Distribute mail, prepare overnight packages, and maintain supplies
Lead Dispatch	Manage and track carriers' daily trip performance measures, punctuality, and service Manage emergency situations for vehicle operators Liaison between carrier and emergency services Manage subscription templates and demand rides to create efficient driver schedules Review and correct route structure for greater efficiency, optimal ride durations, and on-time performance Dispatch duties, as needed
Dispatcher	Manage on-time performance of bus operators Continual service monitoring utilizing scheduling system Immediate response to operational issues
Vehicle Operators	Primary passenger-relations contact Provides safe transportation and exceptional customer service to the passengers Perform scheduled runs, assist passengers as needed, complete pre-trip and post-trip vehicle inspections
Maintenance Manager	Oversee exceptional quality and efficiency of maintenance Schedule and administer fleet maintenance, coordinating vehicle availability with dispatch and operations Assist in troubleshooting equipment issues Ensures proper training of maintenance technicians



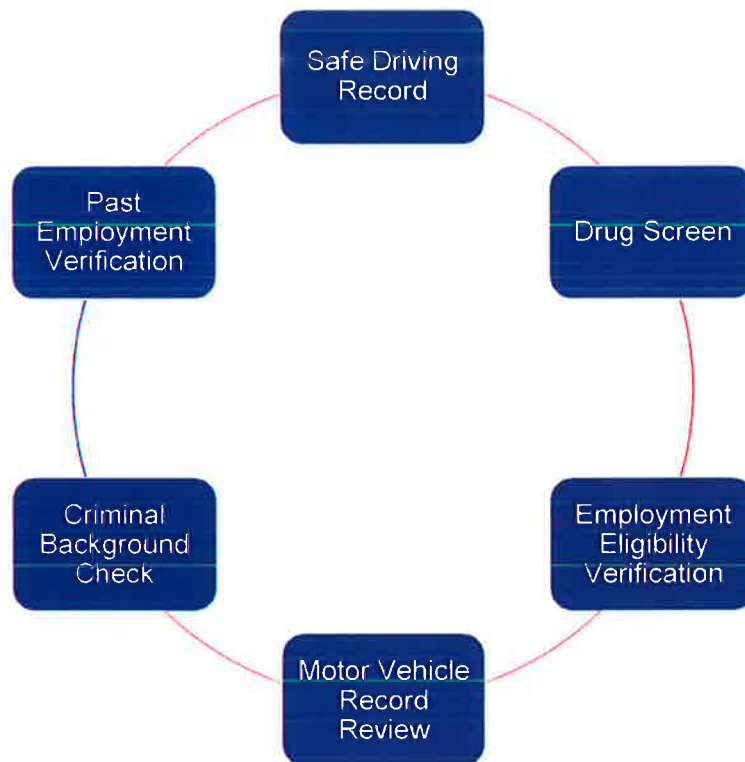
	PMI re-inspections, re-train mechanics on PMI issues Monitor fleet defects, review findings with technicians and maintenance manager to resolve problems Supervise the maintenance and repairs of buses, other vehicles and equipment Schedule and administer fleet maintenance Assist in troubleshooting equipment problems Inventory of parts and maintenance supplies Work order entry and record keeping Communicate availability of vehicles for service with dispatch and other operations personnel Ensures that maintenance technicians are trained and properly equipped
Utility Workers	Clean, fuel, detail, and service vehicles Janitorial and landscaping
Technicians	Safety and preventive maintenance Diagnosis and repair of mechanical, electrical, hydraulic, fuel, and other vehicle and equipment systems



RECRUITING AND HIRING

At First Transit, we look at our company as more than just a provider of transit services. We're a community resource. Our passengers rely on us to safely transport them to school, work, and to the many other destinations that are part of their daily lives.

To be a part of the community, we must involve the community. That's why we actively recruit employees from the same communities and neighborhoods we serve. We do this by sending our teams and recruiters out in the community to attend local career fairs and events, along with collaborating with local CDL and Tech schools to provide opportunities for new graduates.



We work with many national transit organizations to find effective ways and best practices to recruit drivers and technicians. We will work with local and state employment agencies, workforce development agencies, multi-cultural organizations, Veteran Affairs, and military outplacement programs to find dedicated, hard-working people who want to be valued members of the First Transit team.

Working for First Transit requires a sense of commitment, attention, and diligence that is not found in other companies. **That's because we're in the business of transporting people – individuals and families that trust us to provide a consistently safe experience every time they take a seat on one of our vehicles.** We insist that our employees understand our commitment to safety, reliability, and customer service. To ensure this happens, we require a safe driving record, past employment verification, a criminal background check, motor vehicle record review, employment eligibility verification, and a drug screen.

Our recruitment efforts to find high quality employees could include:

- The use of eArcu, an online recruiting tool to generate interest in applying for work at First Transit and successfully track candidates throughout the hiring process

- Ongoing help and support from Regional Field Recruiters and a centralized Talent Acquisition team to ensure the candidate experience is positive, effective, and efficient
- Create & enhance partnerships with tech/vocational schools and other local community schools to improve our branding through networking, campus visits, and career events
- Continuous efforts in analyzing wage surveys and local market trends to ensure we are offering competitive opportunities to qualified candidates
- Banners on buses and at the Monterey Park location
- Yard signs and sandwich boards strategically placed throughout the community
- Distribution of flyers during neighborhood events, such as parades, flea markets, farmer's markets, and sporting events, as well as at local businesses, churches, libraries, police and fire stations and community centers
- Niche-specific online job boards
- Our own intranet (First Bulletin)
- Local publications including, but not limited to, the classifieds in the local paper, free-to-the-public papers, and community newspapers and bulletins
- Postcards or letters mailed to local households
- Radio advertisements and promotions
- Local networks and cable television advertisements
- On-site, local, and regional job fairs
- Billboards



RECRUIT MILITARY®

CONNECTING VETERANS TO CAREERS

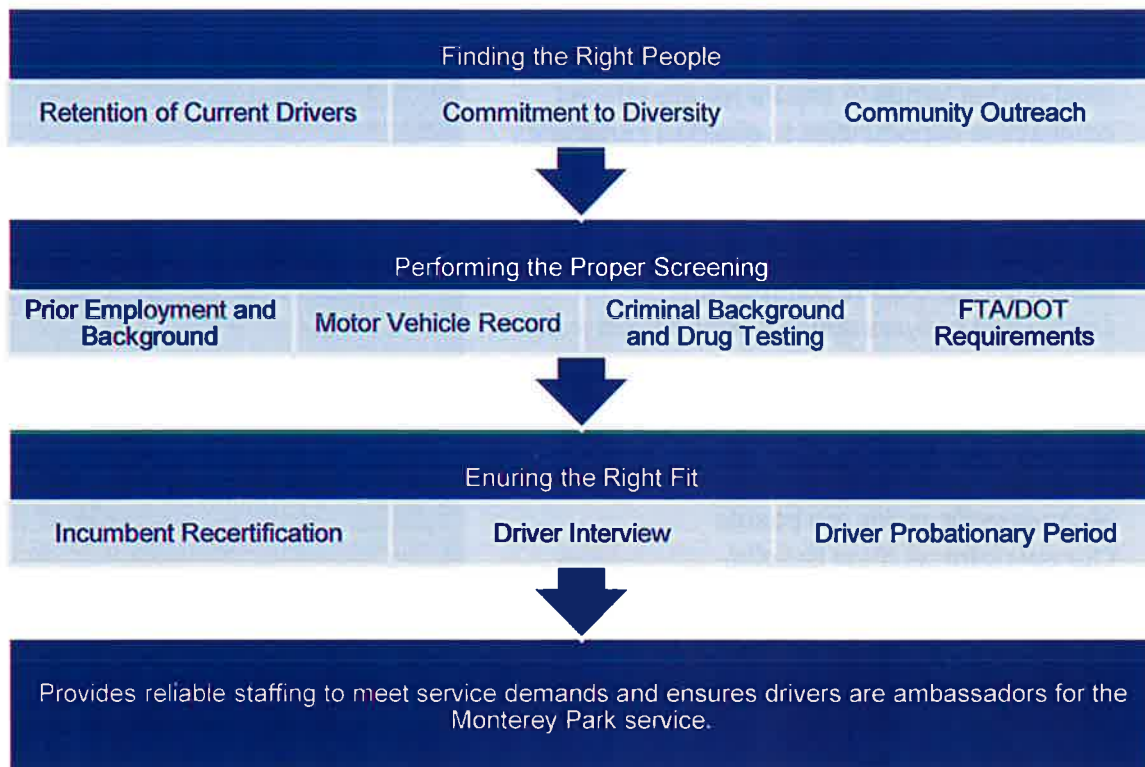
First Transit has partnered with Recruit Military to support the employment of current active military and veterans. Recruit Military is a full-service military-to-civilian recruitment firm that connects job seekers who have military backgrounds with employers. Their hiring services are free to men and women of all ranks/rates and all branches of the service who are transitioning from active duty to civilian life, veterans who already have civilian work experience, members of the National Guard and Reserves, and military spouses and other family members.

Through this partnership, First Transit attends multiple job hiring events, and has access to a database of over 700,000 current active military and veterans to provide new employment opportunities to this skilled workforce. Additionally, our field managers and recruitment teams have completed hours of training to expand our employment marketing, improve recruitment of military applicants, and retain some of America's experienced veterans.



DRIVER SELECTION PROCESS

As your current partner, First Transit understands that our drivers do not only represent us; they represent Monterey Park and your community. Because of the customer-facing nature of the job, proper selection of qualified drivers is vitally important to the success of the operation. We follow a stringent driver selection process to ensure we are providing Monterey Park with drivers committed to safety, focused on the customer, and skilled in their operation.





FINDING THE RIGHT PEOPLE

RETENTION OF CURRENT DRIVERS

As the incumbent provider, First Transit already has a workforce of trained and talented drivers operating the Monterey Park service. We are proud of our incredibly low turnover rate within our Monterey Park operation. Upon contract award, First Transit's management team will ensure drivers are made aware of any changes to current contract terms. Our management team will also perform a review of driver files to ensure training and licensure is up to date.

COMMITMENT TO EQUAL EMPLOYMENT OPPORTUNITY

It is in the best interest of our company, employees, and clients to attract, retain, and develop a diverse pool of talent. An inclusive work place allows employees to reach their full potential, which contributes greatly to our overall productivity and profitability. In fact, most employees at our El Monte location are bilingual in English and Spanish.

To this end, we make every effort to treat candidates equally and fairly. All decisions concerning hiring and promotions are based solely on objective, job-related criteria without regard to race, color, religion, age, gender, sexual orientation, gender identification, national origin, ancestry, veteran status, or disability without regard to race, color, religion, age, gender, sexual orientation, gender identification, national origin, ancestry, veteran status or disability.

COMMUNITY OUTREACH

In the event of employee turnover or expansion of services, First Transit is prepared to solicit new, talented drivers to join our team. First Transit knows the value of employees who are familiar with the service area. We work with local and state employment agencies, workforce development agencies, multi-cultural organizations, and Veteran Affairs and military outplacement programs to find dedicated, hard-working people who want to be valued members of the First Transit team.

In April 2017, First Transit was presented a Certificate of Recognition from the California State Senate for its support of the *Spring Into Your New Career* job fair, which was sponsored by Goodwill Southern California and America's Job Center of California. It read, "Thank you for striving to match job seekers with job opportunities at your company. Your support and participation was greatly appreciated!".

PERFORMING THE PROPER SCREENING

Our Driver/Attendant Minimum Hiring Standards was established to inform candidates of the basic criteria used to evaluate their suitability for employment with our organization. After reviewing this document, candidates may elect to continue the hiring process or remove themselves from consideration.



The following employment criteria are applied to all FirstGroup America candidates who are considered for positions requiring a commercial driver's license (CDL).

Pre-Employment Screening	
Prior Employment and Background	Verification of the last ten years of employment and residency Explanation for any gap in employment or residency exceeding 30 calendar days
Motor Vehicle Record	A valid driver's license for the state in which the candidate resides At least 21 years of age with a minimum of three years driving experience No more than two moving violations within the past 36 months No more than two accidents within the past 36 months (verified by corresponding violation or points associated with accident) The ability to obtain a CDL, as required by the position
Criminal History	Criminal convictions involving one of the following may potentially disqualify a candidate from employment opportunities with any FirstGroup America company: Any crime against a child or vulnerable adult (i.e., disabled, elderly, or infirmed) Kidnapping, abduction, murder, manslaughter, attempted murder, vehicular homicide The possession, manufacture, cultivation, use, or distribution of illegal substances or associated paraphernalia The unlawful use, possession, distribution, disposal, or alteration of a firearm or weapon Any act of violence upon another individual Theft or dishonesty Any offense of a sexual or indecent nature, including the unlawful possession or downloading of publications and images Driving Under the Influence (DUI) or Driving While Intoxicated (DWI) within 15 years
FTA and DOT Requirements	The ability to pass an FTA/DOT-mandated physical examination, or an approved state-specific physical for non-DOT driving positions The willingness to comply with FTA/DOT substance abuse regulations and testing requirements outlined in CFR 665 and CFR part 40

ENSURING THE RIGHT FIT

DRIVER INTERVIEWS

Upon passing the initial screening, First Transit invites drivers to interview to ensure they are the right fit for the operation. The knowledge we have gained from hundreds of thousands of interviews has helped us develop a Driver Interview Guide. This guide helps us consistently screen and select individuals with the characteristics needed to become successful drivers. Specific interview sections include:

- Relevancy of experience
- Schedule suitability
- Response to stress
- Commitment to safety
- Compliance orientation
- Teamwork orientation
- Commitment to customer service



PROBATIONARY PERIODS

First Transit's drivers go through a 90-day probationary period to ensure they are operating vehicles to First Transit and Monterey Park standards. During this probationary period, supervisors and management team members perform enhanced ride-alongs with drivers to ensure all procedures are being followed, the vehicle is operated in a safe manner, and no accidents or incidents occur.

The ride-alongs are used to determine whether a driver is ready for operation, needs more training, or is not fit for service. This driver probationary period is in addition to the probationary period in place for all employees to ensure attendance and performance are meeting the standards set forth by First Transit and Monterey Park.

DRIVER RECERTIFICATION

First Transit's drivers already working for Monterey Park are annually evaluated to ensure they are meeting the standards of service. In addition to employee reviews, our operators annually receive a mandatory one-hour ride check/evaluation. One of our certified trainers rides with the driver and evaluates his/her skills. We assure Monterey Park that current drivers transitioning into the new contract are evaluated annually and continue to uphold the already high standards we provide for you and your passengers every day.

THE PERFORMANCE AND DEVELOPMENT PROCESS

In addition to the annual driver performance reviews, all First Transit employees take part in our Performance and Development Process, which is linked to our FirstGroup Vision and Values.



The process ensures that we are all working toward the same high standards. Benefits of this approach include:

- Consistent approach grounded in our Vision and Values
- Simple forms that encourage meaningful conversation between managers and employees
- Easy-to-use tools to help managers and employees including robust intranet resources, including WebEx's, communications, instructions and manager training

Our performance and development process provides a consistent evaluation of results, both mid-year and annually on simple forms that are easy to use. It ensures that established individual goals are aligned with organizational goals, and there is a clear link between how we work and what we deliver.

Our performance and development process fosters a collaborative effort between manager and employee that includes:

- Continued coaching, not just an annual round of completing appraisal forms
- Checklists for preparing for and conducting the appraisal meeting
- Useful guidance on how to set goals and evaluate outcomes
- Goals and objectives at the beginning of the year
- Employee development plans focused on how to grow skills for both the current position and toward possible future positions
- Creates atmosphere for day-to-day conversations between manager and employee

PROMOTING WORKFORCE STABILITY AND REDUCING TURNOVER

Employee Engagement is a key area of concentration and includes recruitment, training, and communication. We work with our managers on employee engagement by encouraging our managers to understand that our employees are our best assets. We provide them with the best tools and practices for retaining our valuable employees.

As part of our continuous retention plan to promote workforce stability, our Monterey Park staff engages in the following activities:

- **Appreciation events and gestures** including public acknowledgement of achievements, and employee picnics



Collaboration

"Management actually collaborates with you when something goes wrong. They educate you to prevent the problem from happening again."

*Ronny Jay Curry,
Spirit Bus Operator,
Monterey Park, CA*

- **Safety pep rallies** to celebrate achievements in safety and motivate our employees to provide the safest service possible
- Managers and supervisors complete **periodic ride-alongs** with employees to offer suggestions for improvement, and to compliment safe habits
- To encourage the importance of attendance and safety, First Transit will include all **operators with perfect safety and attendance records for the month in a drawing for an award** of gift cards and/or additional paid vacation days



First Transit understands the importance of a robust benefits package to promote employee retention and satisfaction. Our benefits packages include medical, dental, vision, as well as life insurance, disability, and vacation/holiday. In addition, we also offer our employees a 401K retirement plan, often with a company match.

In the event of employee turnover or expansion of services, First Transit is prepared to solicit new, talented drivers to join our team. First Transit knows the value of employees who are familiar with the service area. We work with local and state employment agencies, workforce development agencies, multi-cultural organizations, and Veteran Affairs and military outplacement programs to find dedicated, hard-working people who want to be valued members of the First Transit team.

During our operation of the contract, we want our employees to know how much we value them, and the work they do for us at Monterey Park. First Transit knows that our operation cannot run effectively without every member of our staff supporting our core values; Setting the Highest Standard, Supportive of Each Other, Accountable for Performance, Dedicated to Safety and Committed to our Customer.

WAGE SCALE

Our cost proposal includes a competitive employee benefits and compensation package based on the current economy and our analysis of similar work being performed in the surrounding region. Our proposed compensation levels are included within the Price Proposal tab, *Attachment D – Proposed Staffing*. Our wages are dependent upon employee qualifications and years of experience. These levels will be reviewed throughout the term of the Monterey Park contract to ensure adequate staffing and to help retain a professional, customer-oriented workforce.

Currently, employees at our El Monte location are not represented by a union.



D. RETENTION OF PREVIOUS EMPLOYEES

If the proposer is a transit company seeking to replace an existing transit company, describe whether it will retain employees of the existing transit company per Labor Code § 1072

If awarded the contract, First Transit will retain the employees of the prior contractor or subcontractor for a period of not less than 90 days.

E. TRAINING PROGRAM

Describe the training program proposed for the City's transit operations for the life of the contract. This must include training for drivers, mechanics, and administrative staff and must be accompanied by a schedule that describes the topics of training. Any outside agencies used in training MUST be identified in the Proposal.

TRAINING EXCELLENCE WITH FIRST TRANSIT

First Transit's industry-leading training program is one of the primary cornerstones of our success in the transportation industry. The training we provide for our drivers ensures safe, customer-focused service day-in and day-out across our 335 locations. With comprehensive, up-to-date content and certified, experienced trainers First Transit provides a program that is unmatched by any of our competitors. We recognize that the training we provide has a profound impact on every aspect of service delivery – including safety, customer service, overall quality and efficiency and will continue to work diligently to see that our drivers and employees receive the tools to succeed.

THE RIGHT CONTENT

First Transit ensures we have up-to-date material and content in place through the following measures:

- First Transit is the only private contractor to use official US Department of Transportation (USDOT) training manuals for core training of its drivers.

- Throughout our training modules, we provide an emphasis on safety and customer service.

- Evaluation and constant revision to our curriculum takes place through the collaboration of experts on our local, region, and corporate teams.

- We ensure that innovative technology is incorporated into our training program, allowing our employees to get the most out of the tools available.

- Employees have access to First America University, our online training tool with a database of hundreds of e-learning modules.



THE RIGHT DELIVERY

Our comprehensive training program is delivered by experienced, trained and certified professionals in a manner proven to achieve results. The following highlights of our training delivery ensure that our programs are effective:

- First Transit's Transportation Safety Institute-certified instructors are capable, experienced, registered with the Department of Transportation (DOT) and certified by the highly reputable Smith System Driver Improvement Institute.

- We are the **only transportation provider providing truly one-on-one behind the wheel training**, making sure each driver receives the customized feedback and support to be truly ready to get behind the wheel.

- Our Training Programs are customized to the skills, education and needs of our trainees.

- First Transit embraces training as a career long endeavor, providing refresher and annual trainings to our employees.

- We evaluate an employee's learning and retention through written quizzes, driving tests, and customer service skills evaluations, all of which must be passed to qualify to operate a vehicle.

The Best Preparation

"Safety, to me, means being prepared for all sorts of scenarios, which [First Transit] does for us. The ongoing training keeps it fresh, too."



– Ronny Jay Curry, Spirit Bus Operator

DRIVER TRAINING PROGRAM

All new drivers receive a **minimum of 62 hours of training** including training in all Monterey Park routes, vehicle maneuvering, passenger assistance techniques and customer service, regulatory issues, workplace violence, system security, blood borne pathogens, hazardous materials, CPR, and ADA requirements. Under the FTA MAP 21 guidelines, we have added a course in Distracted Driving and Fatigue Awareness for drivers.



Driver Training Program	Hours
Classroom Training	28.00
Behind the Wheel	24.00
Cadet-in-Revenue	10.00
Total	62.00

The curriculum for our training program features:

- First Transit / TSI Classroom Training Manual
- First Transit specific DVDs
- Participant Guides
- Minimum Standards
- Skills Assessments
- First Transit Injury Prevention
- Facilitator Guides
- Behind the Wheel Manual
- Written Tests
- Proficiency Workbook

Not only are our on-site trainers and managers overseeing the training and progress, but our regional management staff also accesses this information for quality control and oversight purposes. Our instructors have access to our Safety Resource Center that includes all policies and procedures for employee training and management.

CLASSROOM TRAINING

The following minimum classroom instruction is provided:

Classroom Training	DVD/Video	Hours
First Transit Introduction, Company Policy and Procedures	Welcome to FT	1.00



Classroom Training	DVD/Video	Hours
Bus Operations	N/A	.50
TSI - First Transit Defensive Driving / Smith System Curbing Transit Employee Distracted Driving	Smith System Certified Trainer Critical Point Out of Harm's Way	5.00
NTI-Security Awareness	Warning Signs Video & Tri-Fold Pamphlet	1.00
The Operator Drug and Alcohol Awareness Program TSI - Fatigue Sleep Apnea Awareness Injury Prevention and Risk Assessment Back Safety FT - Basics of Safety Safe Work Methods	Basic of Safety Safe Work Methods DVD	4.00
Customer Service Mobility Device Securement	DVD- A.C.C.E.S.S-Matters QRT Safe and Secure Ten Commandments	5.00
TSI Emergency Procedures	TSI Emergency Procedures	1.00
FT Map Reading/Use/Scheduling	N/A	1.00
FT Communication Use & Operation	N/A	.50
Hazard Communication	Global Harmonization/Blood Borne	1.00
CPR Training	N/A	8.00
Total Hours of Training		28.00

BEHIND-THE-WHEEL TRAINING

In-class instruction is only part of our comprehensive training program. To familiarize inexperienced drivers with actual on-road situations and hazards, all drivers complete First Transit Behind-the-Wheel Training. This involves closed-course instruction, controlled course instruction, and road work training.

- **Closed course instruction** trains drivers in complete vehicle maneuverability in a secure area. This training uses simulated obstacles and road situations that replicate the Monterey Park service area.
- **Controlled course work** allows the driver to become more familiar with handling the vehicle in a controlled area. The course is designed specific to the service area, on two lane roads with minimal obstacles, and is less than 35 mph. Drivers learn the challenges of routes and service area characteristics and develop skills to predict and manage actual driving situations.
- **Advanced road-work** training is conducted on a one-on-one basis with qualified trainers. No passengers are on-board during road-work training, while the new operator becomes familiar with service area routes. Drivers are credited **ONLY** for the time they are actually operating the vehicle during road-work instruction.

Behind-the-Wheel training courses include the following modules:

Behind the Wheel Training		Hours
Closed Course (Group Work)		
Vehicle Orientation—Pre-Trip Inspection, Seat Adjustment, Mirror Adjustment, Braking, Accelerating and Transmission, Wheelchair Securement	10.00	
Reference Points—Lane Position, Right/Left Side, Backing Point, Forward Stop, Pivot Points, Turning Points		
Vehicle Control— Straight in Lane, Left turn, Right turn, Lane Changing—Moving Right or Left		
Controlled Course		
Smith System, Intersections, Service Stops, Backing	4.00	
Advanced Road Work		
Smith System Commentary Driving, Roadways, Expressway/Highway Driving, Intersections, Service Stops	9.00	
Final Evaluation	1.00	
Cadet Training	10.00	



Behind the Wheel Training	Hours
Total Behind the Wheel Training	34.00

DRIVER EVALUATION

The safety of our passengers is our number one priority — one that simply cannot be **compromised**. After completing behind-the-wheel training, drivers demonstrate that they have mastered required skills by successfully completing a thorough final evaluation before progressing to cadet training. We do not allow a new hire to operate a vehicle with revenue passengers until this phase of training is completed satisfactorily.

Each driver must pass the Final Evaluation to receive certification as a First Transit driver – a mandate over and above established State and USDOT requirements.

CADET-IN-REVENUE SERVICE TRAINING

The last step in new-driver training – and the transition from instruction to real-world experience – is our Cadet-in-Revenue Service Training. Each new driver, or cadet, is coupled with a certified cadet trainer, who is typically a mentor or senior operator. This one-on-one evaluation includes in-service training hours on actual transit routes.

Cadets demonstrate their ability to drive safely, provide excellent customer service, and assist persons with disabilities and mobility devices. Cadet trainers conduct a final evaluation after the Cadet-in-Revenue modules are completed. Only cadets who successfully pass this final stage of training are qualified to be assigned manifests or routes.



POST-TRAINING EVALUATIONS

To monitor driver performance and ensure continued compliance with the training principles, all new operators undergo three (3) post-training evaluations. These evaluations are completed 30 days, 60 days, and 90 days following successful completion of the training program. Evaluations provide additional mentoring opportunities for new drivers and additional support as successful members of the First Transit team. Operators who need additional training will be referred to and assessed by the Safety Department.



TECHNICIAN TRAINING

First Transit provides unmatched technician training that leads to higher quality repairs for the Monterey Park fleet. We require each technician to participate in at least 40 hours of training each year to increase skills and knowledge of industry technology advancements. A highly trained technician performs higher quality repairs in a more efficient manner—resulting in a better maintained fleet and reduced vehicle downtime.

Our industry-leading training and incentive programs are based on the following training procedures:

- Basic Skills Assessment
 - A concept that individualizes technician training based on the Monterey Park fleet, the skills of the individual technician, and contract obligations.
- ASE Certification
 - A requirement above and beyond industry standards that exemplifies our commitment to industry best practices. Our dedication to the ASE Certification process is illustrated by our incentive program tied to the certification process.

Our systematic approach to technical training and development is critical to superior maintenance performance. In addition to ASE training, which is now available in a Spanish translation, our technicians also receive classroom instruction and on-the-job training provided by our suppliers such as AC/Delco and Ford Motor Company, for example. **Our well-trained technicians make the repairs right the first time.**

BASIC SKILLS ASSESSMENT

All First Transit technicians undergo a basic skills assessment upon hire to determine their individual skills and suitability for the Monterey Park contract. First Transit has partnered with **Cengage Learning/Delmar** – a leading provider of innovative teaching and learning solutions worldwide – to create an interactive learning experience for our technicians.

ASSESSMENT

Our comprehensive online skills assessment allows technicians and managers to objectively baseline knowledge in specific areas. Each assessment measures technical competency to a detailed level of theory, application, and diagnostic ability in a number of technical areas.

TRAINING

After the initial assessment, technicians are assigned to training modules based on their identified needs. Each self-paced module contains critical content that is reinforced through interactive graphics and animations. The training is available at any time, so technicians can work through the materials at their convenience. Each course contains an average of 8.5 hours of training materials and can be completed in either English or Spanish.



CERTIFICATION & MONITORING

Each section within the module is completed with final review questions and each module requires a course review and exam before completion. These tests combine helpful remediation while addressing the unique needs of the technician with text-based theory for enhanced learning and retention. A variety of study options are available, including practice questions, sample ASE-style tests, and a timed test duplicating the actual ASE Exam.

Managers and supervisors may log into the system at any time to monitor technician activity within the training program. Supervisors and managers can produce a Course Usage Report to track of hours dedicated to the training curriculum to encourage technicians to continue progressing through their customized training program.

ASE CERTIFICATION

Our technicians attend training and certification testing provided by the National Institute for Automotive Service Excellence. The ASE training program has a series of more than 18 tests that measures skill level in vehicle maintenance and repair. These tests are grouped by specialty including front-end alignment, brakes, air conditioning, electrical, engine repair, etc. These tests have also been translated for our Spanish-speaking technicians.

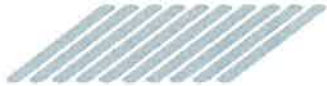
We understand the value that ASE certification provides not only to Monterey Park but also to the career development of our valued technicians. This is why we require our technicians to become Automotive Service Excellence (ASE) certified. First Transit has technicians with over 2,700 ASE certifications at our contract locations across the United States.

ASE certification means that Monterey Park always receives the best service quality each time a vehicle is maintained by First Transit—reducing unnecessary repairs to the fleet and vehicle downtime.

ASE BONUS PROGRAM

First Transit's commitment to training and the ASE certification program is made tangible through our ASE Incentive Program. Offering access to all ASE testing at no cost to the employee, there are two ways that employees can earn per hour bonuses on each hour they work.

- While working to earn his/her first Master Technician Certification, the employee will receive a \$.15 per hour bonus for each ASE test successfully completed – Upon earning his/her first Master Technician Certification, the employee will receive an additional \$.15 per hour bonus
- While working to earn his/her second Master Technician Certification, the employee will receive a \$.05 per hour bonus in addition to his/her regular rate for each ASE test successfully completed – Upon earning his/her second Master Technician Certification, the employee will receive an additional \$.05 per hour bonus



Please see a detailed chart of our ASE Bonus program structure included in the Attachments to this proposal.

MAINTENANCE TRAINING SUPPORT

First Transit employs six (6) full-time travelling maintenance trainers who are highly experienced in all aspects of vehicle maintenance. These persons will visit the Monterey Park location maintenance personnel to facilitate additional training for the team.

We provide an additional benefit to our clients from our relationships with original equipment manufacturers (OEM) and national parts suppliers. Trainers including AC/Delco, Cengage Learning/Delmar, Noregon Diagnostics, General Motors, Ford, etc. visit our locations sites to instruct technicians in a variety of areas such as electrical and manufacturer specific training. The purpose of vendor training is to improve the skill set of technicians for improved service delivery.



DISPATCHER TRAINING PROGRAM

Our widespread practice is to hire dispatchers with transportation route experience and who have worked at least six months as a driver.

Dispatchers concentrate on customer service modules, while obtaining a thorough understanding of our Monterey Park on-road operations. First Transit frequently fills dispatching roles from current driving staff. The training program for dispatchers is based on driver training curriculum and requires the successful completion of operator training prior to promotion to that dispatch role.

• Importance of being a leader at First Transit. • How to relate with operators and other personnel to effectively perform Transit Operations. • Security Awareness to be a major player in providing a safe facility and operations. • Learn the components of providing a safe and reliable workforce. • The importance of safety in day-to-day operations.	• Drug & Alcohol Abuse Policy ... • Reasonable Suspicion • Communication Skills • Map Reading / Directions • Leadership Skills • Customer Service • SSSP Program • System Security & Awareness for Transit Employees
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As dispatchers are key customer service personnel, they are required to participate in driver training programs that assist in their duties (including service area familiarization, passenger assistance, and customer relation courses). **First Transit cross-trains all our dispatchers for both Radio and Window dispatching functions.** This ensures that our Monterey Park operation has well-trained and experienced dispatchers during all hours of operation providing a consistently high level of performance.

All dispatch staff will receive in-depth training relative to effective record keeping, and communication skills and will receive extensive training on the use of radios and other necessary technologies. Annual refresher training with a minimum six hours will be provided for all dispatchers.

Staff are subject to written tests, supervisor observation, refresher training, and retraining in response to minor infractions. Dispatch staff also receive training in Reasonable Suspicion for Drug and Alcohol Use, Hazard and Emergency Response, and Transit Bus Accident Investigation.



Subject of Class Modules	Method	Time
Role of Dispatcher	PPT	1.0
Customer Service	PPT & Discussion, examples	2.0
IP Program – Contact Slips, Intentions	PPT	0.5
Conflict Resolution CARE	DVD	0.5
Documenting Discipline	PPT	1.0
Time Management / Prioritizing Tasks	PPT	1.5
Harassment in the Workplace	PPT	2.0
FTA Drug & Alcohol Policy/Drug Testing/Types and When	PPT	1.0
Reasonable Suspicion – FTA Requirements	PPT / Video	2.0
ADA – Dispatcher's Role in Compliance with ADA	PPT	1.5
FORM process (Work Comp)	PPT	1.0
BBP – Exposure Events	PPT	1.0
System Security	PPT (NTI)	1.5
Emergency Management	PPT / Discussion	1.5
SAS Alarms – Protocol	Discussion	0.5
Phone Protocol – Emergencies	Hand-Outs	0.5
Bomb Threats	Hand-Out / Discussion	0.5
Evacuations	Hand-Out / PPT	0.5
Bus Assignments	PPT / Discussion	1.0
Scheduling	PPT	1.5
Vehicle Change Procedures	PPT / Discussion	1.0



Telephone Etiquette	PPT/Hand-out	2.0
Daily Assignment Sheet	Hand-out	1.0
Lot Check Procedures	Hand-out/Discussion	1.0
Uniform Compliance & Regulation	Hand-out/Discussion	1.0
Lost and Found Procedures	Hand-out/Discussion	1.0
Dispatch Station Assignments	Discussion	1.0
Dispatch Daily Paperwork	Hand-out/Discussion	1.0
Operator Scheduling	PPT/Hand-out	1.0
Accepting Customer Feedback	PPT/Hand-out	1.0
Credential Checks	PPT/Hand-out	0.5
Orbital and Radio Communication	PPT/Hand-out	2.0
Dispatch Software	PPT/Hand-out/ Hands on	2.0



ON-THE-JOB MENTOR TRAINING

Our mentoring program supplements the formal dispatch training by teaming new dispatchers with senior staff to ensure they are confident in their duties and ready to fill their roles. Trainees accompany senior staff in the performance of their duties to receive training and feedback on their skills.

Once the dispatch employee has successfully completed the new employee orientation and training programs, they are assigned to work alongside one of our designated mentor employees. This includes on-the-job training for both radio and window dispatching roles. Our mentor employees are selected based on their exceptional performance and demonstrated understanding of their job functions.

STAFF CROSS TRAINING

First Transit learned long ago that successful management of a transit facility—in any form—requires flexibility. The general manager and operations & safety manager must have the ability to adjust staff positions to adapt to day-to-day circumstances. We believe cross training Monterey Park staff in multiple positions, in addition to training as customer service representatives, prepares us in advance to meet the needs of each department through sickness, vacations, peak times, and disasters.

FIRST AMERICA UNIVERSITY

First Transit, and our parent company, FirstGroup America, recognize that our valued employees are the keys to our success. Because of this, we have made a significant investment in tools to help in the development of our promising employees. One such tool is First America University, an online resource to help motivated employees reach that next level in their careers.



Since launching First America University in 2014, we have expanded our online course catalog to over 4,000 classes, some of which are custom-designed for FirstGroup employees. We continually update content and add new courses to the library, ensuring that employees have a wide selection of opportunities available. Courses range from professional development tips to advanced Microsoft Office trainings. Many courses have been translated into Spanish and French, in addition to English.

First America University courses are available in addition to in-person training, to supplement our employees' career development and individual training needs. First America University allows new employees to receive professional training from the convenience of their own



computer, without the hassle or expense of traveling. Many First Transit employees use this valuable resource.

First Transit has also created customized learning plans specifically for management positions. These plans, which we refer to as the Keys to Success, include job-specific courses and information relevant to specific roles. Current employees and employees looking to move up to the next level in their careers have access to these learning plans. Not often do employees get the opportunity to attend online training for the next level of management prior to promotion; FirstGroup gives them that chance.



F. OPERATIONS SUPERVISION PLAN

Describe what methods, procedures, techniques and programs will be put in place to ensure delivery of consistent, high quality service. Please make a distinction between what the basic requirements will be for dispatching and supervision versus the extra efforts applied to address problems and issues.

First Transit understands the importance of effective operational supervision in delivering safe, high quality service that exceeds the City's expectations, and those of our shared riders. Our road supervisors and dispatch personnel are key to our approach to successful daily operations with a focus on starting the service day on time, monitoring performance throughout the day and seeing that our drivers provide safe, customer-focused service. The combination of dispatchers' efforts from our El Monte location and road supervision efforts from the field provides our drivers with the support and guidance they need to safely and reliably carry passengers to their destinations.

In the new contract, supervision efforts will be aided by **three new technology tools – DriveCam, DoubleMap and supervisor tablets.**

- **DriveCam** will provide an additional avenue in which to monitor driver habits and behaviors, as well as bus conditions and passengers. The DriveCam system can record continuously or can be triggered when particular events happen – accidents, aggressive accelerations, sudden stops, hard cornering, or manual driver activation, providing opportunities for individualized coaching and training.
- One of the benefits of the introduction of **DoubleMap technology** will be the ability for dispatchers to monitor the location of Monterey Park vehicles in real-time, as well as changing traffic and road conditions that can impact service delivery. This tool will greatly enhance dispatchers' ability to support our drivers in the field.
- Our road supervisors will be equipped with **tablet computers**, facilitating their ability to stay connected to overall system performance through DoubleMap while supporting our drivers in the field. Additionally, tablets will allow our Road Supervisors to spend less time on paperwork, with the ability to complete important reports, including accident documentation, outside of the office.

Described in greater detail throughout our proposal, these tools will allow our supervisors and dispatchers to go over and above the basic requirements of their roles – enhancing our ability to address potential performance concerns and changing operational conditions before they become problems and issues.

To better serve our Monterey Park riders, our operations plan emphasizes the importance of continued provision of service in the safest and most efficient manner possible. Our ability to quickly and professionally respond and react to changes in the operating environment (traffic, vehicle performance, passenger capacity) directly affects the quality of service to our shared customers. As described throughout this section, the Operations & Safety Manager, Juan Casillas, and his staff of road supervisors and dispatchers support the General Manager in



offering guidance and instruction to drivers to ensure the delivery of consistent, high-quality service.

ROAD SUPERVISORS

All field supervisory personnel are trained fully in all aspects of Monterey Park's fixed route services including rules and regulations, routes, schedules, emergency procedures, safety, federal and state requirements, reporting protocols, and other requirements. Additionally, road supervisors help the Safety and Training Manager with Closed Course and Behind-the-Wheel training of new drivers. Some responsibilities of Road Supervisors are described below.

Road Supervisor Responsibilities

Actively deployed in the field during all hours of operation to respond quickly to Driver requests for assistance and emergency conditions. Most of our Road Supervisors' time will be spent on the road.

Respond promptly to accidents involving clients and vehicles. Accident reports will be completed including statements of all parties involved, witness statements and contact information and police report information.

Complete detailed Road Supervisor daily reports.

Provide on-street monitoring including, but not limited to, vehicle conditions, Driver professionalism, complaints of Driver conduct, Driver performance, Driver appearance, and adherence to service rules.

Communicate routinely with representatives at facilities that serve large numbers of customers. A summary of these meetings and activities will be provided to staff on a weekly basis.

Conduct site evaluations to figure out a safe and appropriate location for picking up and dropping of passengers and provide detailed comments to give Drivers specific instructions on where to go and how to enter and exit location.

Pre-trip vehicles and help in getting Drivers off the lot on time.

Driver training: On-time performance coaching and training; backing on board training; testing of new hires.

HOW SUPERVISORS MONITOR PERFORMANCE

The Road Supervisor staff— Ezequiel Jimenez and Valerie Leyba—performs gate checks as the drivers prepare to leave the yard. They randomly perform a pull-out inspection, as well as an evening pull-in, to check on operators in their work environment. If a supervisor detects a defect, then they date the DVI and place it in the vehicle file, where its available for inspection or review at any time.





After the vehicles begin service there will be two types of daily quality control checks—observations and time-point checks. These unscheduled (observations) and scheduled (time-point) checks help First Transit maintain our on-time performance, vehicle cleanliness, and safe-driving practices, while preventing vehicle bunching. Both checks work together to improve the service to customers, and operators who fail these inspections, or have difficulty delivering on-time service, go through coaching and retraining. Regular time-point checks also help to highlight potential route timing issues and passenger loads. Road observation ensures that drivers follow First Transit, Monterey Park, State, and Federal laws for safe vehicle operation. It also ensures that drivers follow company policies for good customer service.

The Road Supervisor is an integral part of the First Transit Safety Solutions Team. If an accident or incident occurs, the Road Supervisor investigates, photographs, and includes their report on the accident to the Safety Manager. The Road Supervisor also monitors tablets to ensure that drivers are developing safe driving habits and not performing any unsafe acts during operation.



First Transit's Road Supervision Program supports enforcement of rules and regulations focused on courtesy to patrons, safe vehicle operation, and on-time performance.

First Transit will equip our road supervisors with tablet computers, allowing them to stay connected while out in the field. These tablets will have access to our new DoubleMap monitoring software, giving our supervisors access to real-time data and allowing them to provide more responsive infield support. Up-to-date access on system performance will increase awareness and allow our supervisors to address minor issues before they become real problems.

The tablets will also allow our supervisors to complete paperwork from the field, including accident reports and other important documentation. When time is of the essence, this communication tool will be instrumental in providing effective, comprehensive and educated on-road supervision.

DISPATCHERS

Our Lead Dispatcher, Cecilia Pacheco, reporting to the Operations & Safety Manager, works directly with dispatch and radio control staff to control effectiveness and efficiency. The Lead Dispatcher promotes effective communication between dispatch, field supervision, bus operators, and management staff. This position aids dispatch in problem-solving related to scheduling and performance to support on-time service.

Dispatch staff ensure drivers are ready for service and meet compliance requirements (e.g., license, fitness for duty, appearance, paperwork, fares, etc.). Staff assigns work runs and



vehicles, guaranteeing exact schedules, manifests, and vehicle assignments. Our staff watch and manage prompt deployments and returns according to the schedule, and receive notification of routes that violate scheduled times from the feedback provided by DoubleMap. This initial management helps ensure on-time performance even before the route departs base. This results in a reduction in the “domino effect”—late deployments affecting the timeliness of subsequent route events.

To effectively balance operational needs with available personnel resources, dispatchers also monitor driver work hours, and assign extra board service as needed using First Transit procedures for efficient utilization of labor and vehicle assignments. Vehicles assignments are based on the availability of vehicles as determined by the maintenance department.



Dispatchers also perform real-time schedule updates to effectively manage day-of-service changes. Road Supervisors and other members of the team will continue to help dispatchers with monitoring service. At a minimum, our Dispatchers will continue to:

- Monitor and manage the on-time performance of scheduled routes
- Act as first response to deploying the on-time alternative vehicle, due to vehicle breakdown, etc.
- Provide continuous monitoring and controlling of assigned radio frequencies during all hours that service provider vehicles are out of the yard
- Ensure all voice radio communications pertain to service and enforce all FCC rules and regulations for data and voice communications

EXTRA EFFORTS APPLIED TO OVERCOME OPERATIONAL ISSUES

Late buses and missed trips are operational issues we strive to avoid. The root causes of such issues can include:

- Signalized intersection delays
- Accident/incident
- Over-crowded bus trips
- Mechanical delays/breakdowns
- Loading/unloading single stairwell buses
- Heavy traffic
- Driver training issues

First Transit will continue to report to Monterey Park for review and adjustment any routes that suffer from frequent late buses due to some of the issues above.

GAPS IN SERVICE

As each of Monterey Park's individual routes only have one Spirit Bus running on them at a time, problems that often cause service gaps, such as bunching, do not apply. Therefore, on-time performance is the critical factor in ensuring continuous service. Through our road supervision staff, we focus on the positive things our drivers do, and provide genuine feedback to improve weaknesses. Our Monterey Park Road Supervisors support everyone's efforts to provide on-time performance through recommendations for improved service and helpful reinforcement of our mission to continually improve driver's performance. We encourage all First Transit staff to make decisions within constraints to help improved service.

IN-SERVICE FAILURES

First Transit takes pride in our preventative maintenance program, and with more than 60 years of fixed route experience we know that issues do arise that require us to respond to vehicle breakdowns. As your current provider for Monterey Park services no one knows your fleet like we do, we feel confident in our ability to handle any type of breakdown that may occur.

Field supervisors are the first responders to breakdowns and ensure that service is not excessively interrupted. Using a replacement bus leaving the facility, or "picking up" the trip with a bus that would otherwise be returning to the facility helps to quickly restore service for the passengers.

Our Maintenance Manager continuously tracks road calls and repeat mechanical failures. Through this information and First Transit's preventive maintenance program, we aggressively





pursue issues and reduce the level of repeat failures. First Transit will continually improve our miles between road calls and immediately respond if disruptions do occur.

UNUSUAL TRAFFIC CONDITIONS

Our road supervisors communicate with dispatchers, providing feedback that helps drivers prepare for unusual traffic conditions on a route. This allows drivers to focus on changing road conditions, including increased traffic, planning for alternate routes, and even inclement weather. Interaction with dispatch is a valuable tool in preventing loss of performance and aids in rapid response to issues.

FARE DISPUTES

First Transit's procedures include that we ask passengers for the correct fare and notify dispatch if a dispute arises. The driver will continue to attempt to resolve the issue but informing the passenger of the fare price and reporting the incident to a dispatcher or supervisor usually resolves it. If the passenger is still not satisfied, a Road Supervisor meets the bus, and discusses the dispute further with the passenger. Recurring problems from the same passenger may require a directive from the City for further action.

First Transit will continue discuss fare disputes and their resolution with Monterey Park to ensure compliance with all established policies and procedures. Fare disputes are covered in initial training, and we discuss this issue periodically at our monthly safety meetings.

G. SAFETY PROGRAM

Describe in detail the driver and passenger safety program and the standards applied to the work force in terms of acceptable safety performance and the means used to measure such performance.

FIRST TRANSIT'S SAFETY CULTURE

Safety is not a set of policies and procedures. Safety comes from conditioning proper thought processes and behaviors, preparing for situations, and knowing how to respond in ways that protect the well-being of people, those with whom we work, and those we serve.

First Transit's Safety Program encourages all First Transit employees to replace risky behaviors and thought processes that jeopardize safety in the workplace. Through the program, we are striving to build a cultural identity that is focused on:

- Rewarding improvements in both individual and team performance
- Encouraging group safety awareness activities
- Recognizing and rewarding personal safety longevity

From management to operations, safety is the number one value of every First Transit employee. Our program was initiated to minimize risky behavior for the greater good of each person and our entire team. No priority or perceived priority should be pursued without following safety standards.

We emphasize this safety culture in our employee recruiting, selection, orientation, training, education, and management support. Our drivers, mechanics, and other employees are expected to look out for the safety of the passengers we transport each day. That same protection is given to our coworkers, those that depend on each of us to do our jobs without shortcuts that can cause injuries. Safety is continually stressed and reinforced throughout our day-to-day operations, in our employee reviews, and at every management and employee meeting.



**THINK SAFE,
ACT SAFE, BE
SAFE.**

This is First Transit's
core philosophy.
Safety is at front of
everyone's mind
always.



BE SAFE – SAFETY LEADERSHIP PROGRAM

The Be Safe Safety Leadership training program focuses on changing the compliance culture through engagement to tap into employees' discretionary effort. Our program design focuses on use of positive reinforcement to build safe operational practices. To do that, we improve the knowledge, foresight, awareness, judgment, and skills of our employees to encourage preventive approaches to safety.



At-risk behaviors lead to negative consequences (e.g. reprimands). Safe behaviors only result in avoiding negative consequences. There are side effects of negative reinforcement and punishment including low morale, low productivity, decreased volunteerism, increased turnover and suppressed reporting of incidents and near misses. The positive reinforcement approach recognizes safe behaviors through catching people doing it right. Positive reinforcement strengthens behavior so safe behaviors will happen more often. As momentum builds, so does the discretionary effort employees put into their jobs. Safety performance improves as does the passenger experience overall.

The Be Safe Program is incorporated into manager and supervisor training through hands on, interactive training by certified Performance Management Consultants, further supported by additional eLearning modules. The training helps managers identify how their own everyday behaviors, and those of their team, influence safe behaviors and overall safety for the clients and communities we serve.

Think Safe
Act Safe
Be Safe



Led by location managers and supervisors, Be Safe encourages safety conversations to promote employee accountability to achieve safety. As frontline leaders, the managers and supervisors implement skills-based training to shape, promote, and maintain positive safety behaviors. Be Safe reinforces our group-wide safety goal of Zero – this means zero accidents, zero injuries, and zero fatalities.

The Be Safe Program ensures our employees:

- Understand the behavioral causes of safe and at-risk behavior and how to create the optimal conditions for safety
- Develop proactive safety practices, measure performance, and improve safety behaviors
- Are confident in their skills to have consistent and quality safety conversations
- Uphold a measurable three-point framework for safety conversations – plan, touch-point, review
- Use the insight and data from safety conversations to make and influence better safety decisions

First Transit focuses beyond simply changing our safety processes and systems toward fundamentally changing our day-to-day safety habits and behaviors. As leaders, managers play a critical part in this process through daily interactions with employees to encourage, reinforce and influence good safety behaviors.

BE SAFE ACCIDENT AND INCIDENT PREVENTION

To help emphasize the importance of safety, we have created the Three Pillars of Injury Prevention:



ACTIVE CARING

Active Caring makes sure that injury prevention drives our day-to-day management activities. Active Caring is gaining the courage to have safety conversations, performing safety tours, risk assessing for your sake and others, and taking a “brother’s keeper” approach to safety by encouraging others to adhere to safety principles at work, just as they do at home.

PERFORMANCE MANAGEMENT



Performance Management requires our managers to take an active role in helping achieve our goal of zero collisions and zero lost-time injuries. Safety must drive the decision-making and guidance provided by our managers. Our managers are the force that puts our safety policies, procedures, laws, and regulations into practice, and they are responsible for measuring the performance of our staff against our goals.

Although we will always continue to evaluate our safety performance via Key Performance Indicators, performance management is a more proactive way of modifying unsafe or potentially unsafe employee behaviors before accidents or incidents occur. We are increasing developing new methods to measure and identify indicators of potential behavior issues we proactive behavior modifications can take place.



CONTINUOUS IMPROVEMENT

Continuous Improvement is critical for reaching our zero goal. Safety is not a one-time occurrence. It is part of our culture and everything we do today, tomorrow, and every day we come to work. Our safety standards and best practices are continually updated with input from industry safety experts, fellow industry leaders, and our front-line employees. We analyze safety trends to identify corrective patterns, then incorporate changes to improve our overall performance. First Transit leverages our vast experience nation-wide and the experience of our sister companies across the globe to develop best practices in safety, identify trends and develop action plans.

"Safety has no on or off switch. It is an important aspect of our daily lives."

— Juan Cassilas, Operations & Safety Manager, Monterey Park

MOVING AHEAD FOR PROGRESS IN THE 21ST CENTURY ACT (MAP-21)

First Transit has already put MAP-21 in action and incorporated Safety Management Systems (SMS) principles into our culture. We have and will continue to be ahead of the game in terms of local, state, and federal regulations and FTA requirements regarding safety programs and procedures. Our SMS and System Safety and Security Plan combine established systems safety engineering principles with advanced organizational management techniques. Our SMS supports continuous improvement in safety performance through a positive safety culture founded on four basic principles:

Safety Policy

- First Transit policies build a foundation for our safety program, safety is our top priority to our employees, Monterey Park, and our mutual customers. Think Safe, Act Safe, Be Safe.

Safety Risk Management

- Our Injury Prevention Database encourages managers and employees to work together to identify hazards proactively.

Safety Assurance

- The Be Safe leadership program ensures that everyone is accountable to make sure we deliver safe results.

Safety Promotion

- Every shift meeting starts with a daily safety message. Monthly there are mandatory safety meetings at all our locations led by the management to discuss safety trends at the location, throughout the company and in the industry.



We take pride in our approach-involving and share our knowledge among the public, transportation agencies, state agencies, and the FTA.

CERTIFIED SAFETY & SECURITY OFFICER (CSSO) PROGRAM

First Transit's qualified location safety managers are certified through Community Transportation Association's Certified Safety and Security Officer Program. Upon successful completion of the program, our safety managers are Certified Safety & Security Officers (CSSO). The course covers the following eight areas in compliance with the FTA Transit Bus Safety & Security Program:

- Leadership & Administration
- Transit Operations
- Maintenance & Technology
- Personnel Management
- Training & Development
- Safety Initiatives
- Security Initiatives
- Emergency Preparedness

Monterey Park can rest assured that your service is operated and maintained by an experienced transit partner and held to the highest safety standards in the industry.

FIRST TO ZERO

When safe behavior becomes instinctive, quality of life improves, working conditions are more favorable, and collisions and injuries are reduced. As part of our extreme focus on safety in the workplace, we have initiated a **First to Zero goal**, which means we will strive to **achieve zero collisions and zero lost-time injuries**.

As we strive to reach First to Zero, we will build on the accomplishments we have already achieved. Our key safety actions for the current year include:

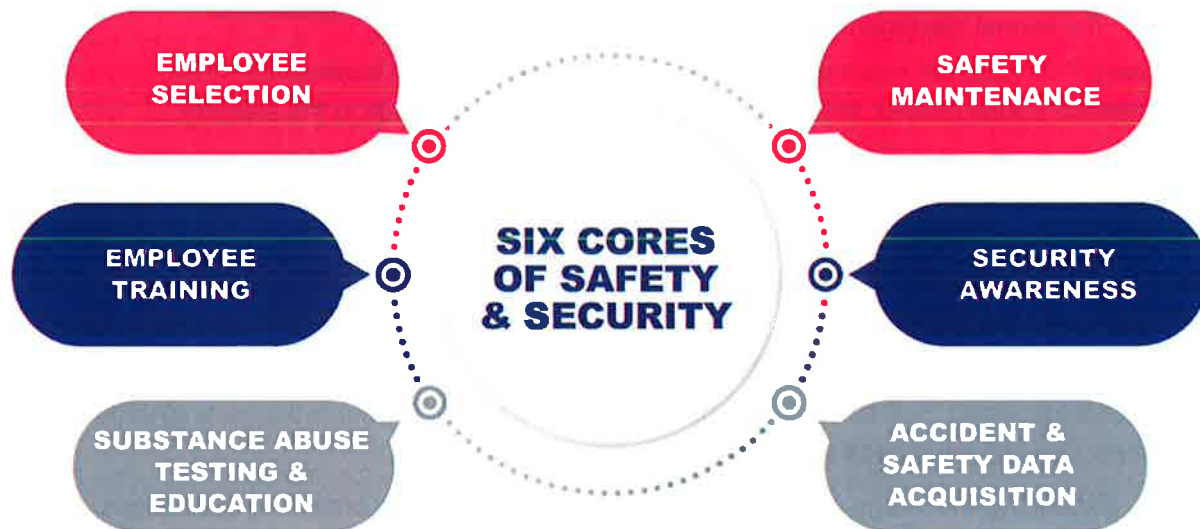
- Expanding the usage of Smith System driver safety training across all businesses
- Implementing campaigns designed to prevent passenger injuries related to slips, trips, and falls
- Championing the National Safety Council's campaigns around teen driving, distracted driving, and safe communities



- Implementing actions to prevent injury when handling passengers, wheel chairs, baggage, and freight
- Provide training on dispute resolution to preventing assaults by difficult passengers

FIRST TRANSIT'S SYSTEM SAFETY AND SECURITY PLAN

Our System Safety and Security Plan (SSSP) is based upon federal safety regulations and describes the standards in place for driver and maintenance employee hiring, training, vehicle safety, and record keeping. Our SSSP is divided into six core areas of focus.



CORE 1—EMPLOYEE SELECTION

Working for First Transit requires a sense of commitment and dedication to safety that is not found in other companies. We insist that our employees be committed to safety, reliability and customer service. To ensure this happens, we use predictive data and a thorough evaluation process when selecting new employees. We require a safe driving record, past employment verification, a criminal background check, motor vehicle record review, employment eligibility verification, and a drug screen.

CORE 2—EMPLOYEE TRAINING

In support of our security plan, our training programs are focused on safety and security. Below is a brief overview of the kinds of training we provide our employees.

Training	Description
Driver Training	The new driver education and training process provides learning opportunities in two areas of focus – classroom (knowledge-based) and behind the wheel (skills-based). First Transit's certified instructors teach all training. Classroom and behind-the-wheel (BTW) training for new drivers includes programs based on TSI and Smith System modules.
Certified Instructor Program	We combine our own instructor certification program with the Transportation Safety Institute's (TSI) certification program to create a standard training initiative that is built on industry-leading quality and excellence. Our certified trainers provide competency-based job-related training. All TSI-certified instructors are registered with the Department of Transportation (DOT), which provides unmatched training regulation and compliance. In addition, our instructors also are certified by the highly reputable Smith System Driver Improvement Institute.
Ongoing In-Service Training	We provide ongoing in-service training to help our drivers keep their skills up to date. Drivers take part in mandated annual safety meetings and periodic safety awareness campaigns that provide detailed instruction on defensive driving techniques and other safety-related issues. Both regularly scheduled and random road observation checks evaluate our drivers' compliance with policies and procedures and rate their overall proficiency. In addition, every driver is required to undergo a ride-along evaluation once every 12 months with a certified trainer.
Collision & Injury Retraining	Drivers involved in collisions are required to take part in our collision-retraining program. Certified instructors lead the two-hour classroom and behind-the-wheel retraining course that focus on identifying root causes and contributing factors when collisions occur. Once causes or contributing factors are determined, we retrain drivers to correct issues such as improper backing or improper mirror use.
Safety Training	Every module in our driver training programs have an underlying theme of safety. Training modules such as Vehicle Familiarity, Vehicle Maneuvering, Service Area Familiarization, Passenger Assistance Training, and Defensive Driving are specifically designed to provide drivers with the knowledge they need to operate revenue vehicles safely.
Safety Re-training	Mandatory monthly safety meetings for the Monterey Park service will include topics of local importance and will reinforce the important position that safety occupies on the job.



Training	Description
	All drivers receive routine and continuous in-service training on the safe operation of revenue vehicles. Additionally, drivers and dispatchers receive annual refresher training on safe operations. This process will also include identification of “high interest” drivers and behavior modification efforts to proactively improve safety habits.
Safety Discipline	We have strict operating regulations regarding safety and injury-prevention measures. We focus disciplinary action on the incident, not the severity of the outcome. Any employee who demonstrates a disregard for safety is held accountable for his or her actions, since unsafe performance can result in an escalation of risk. Repeated violations will result in termination.

SAFETY TRAINING PARTNERS

We have partnered with many of the organizations that drive industry-wide instructional standards and programs to help develop our own safety training needs. We rely on their experience, research, and continual program updates to help us stay on the leading edge of employee training.

National Safety Council

The National Safety Council's (NSC) mission is to save lives by preventing injuries and deaths at work, in homes and communities, and on the roads, through leadership, research, education and advocacy.



Working with NSC, we have adopted the following initiatives to help achieve our own injury prevention goals:

- NSC membership and training
- Participation in the NSC Congress & Expo panels and technical sessions
- Participation in NSC's Safe Communities America program
- Involvement in symposiums and advisory roles
- Planned meeting on teen driving initiatives
- Development of FirstGroup's 2008 Cell Phone Policy (total ban)

Smith System Driver Improvement Institute

Our preferred driver-training program incorporates the Smith System of Defensive Driving program. The focus of this class is hands-on, behind-the-wheel learning in actual driving environments. Smith System classroom training includes:

- Common factors that cause collisions
- Smith System's Five Keys to Space Cushion Driving
- The 5 Keys plan to avoid backing collisions
- Use of important traffic information to gain an advantage

- Isolate and insulate the vehicle in traffic
- Forecast the probable activities of other drivers
- Reduce fuel consumption
- Reduce vehicle maintenance costs

Transportation Safety Institute

We use the Transportation Safety Institute's (TSI) professional modules for our TSI instructor-training program, and for our training on customer service regarding passenger assistance and ADA issues. All TSI-certified instructors are registered with the DOT.

National Transit Institute

Our passenger, facility, and vehicle security programs are based on industry-leading security standards, including:

- Public Transportation System Security and Emergency Preparedness Planning Guide (published by the US Department of Transportation)
- Transit Security Handbook
- Transit Security Procedures Guide
- National Transit Institute (NTI)'s pocket handouts
- Employee Guide to Workplace Violence – Prevention, Response, and Recovery
- Employee Guide to System Security – Observe and Report

NTI's Multimodal Transportation Planning courses support the following standards:

- Transportation Equity Act for the 21st Century
- Intermodal Surface Transportation Efficiency Act of 1991
- Clean Air Act Amendments of 1990
- Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), and their regulations and support of the good practice of multimodal transportation planning

CORE 3—SUBSTANCE ABUSE TESTING AND EDUCATION

First Transit, the Federal Transit Administration (FTA), and the US Congress have determined that alcohol abuse and illegal drug use pose specific dangers to the safety and welfare of the nation. Furthermore, the FTA has specifically stated that the use of alcohol and illegal drugs significantly affects the performance of individuals involved in the mass transportation industry. Because of the risks to employees, passengers, and the community at large, it is our policy – and that of the FTA – that safety-sensitive employees be free from the influence of drugs and alcohol. Please see our Drug & Alcohol Policy in our Attachments section.

CORE 4—SAFETY MAINTENANCE

All maintenance personnel are trained in shop safety, OSHA standards, vehicle maintenance, driving techniques, and safe driving. Employees are continually evaluated and tested throughout



the training program. Those who do not demonstrate the required level of proficiency are provided additional training or are removed from training.

We audit our training procedures to verify that all policies are enforced to prevent incidents, collisions, and injuries. Safety audits include government level auditors from FTA, OSHA, DOT, and third-party auditors. We also provide our own internal corporate auditors and local on-site safety auditors. From First Transit's director level and above, each auditor is responsible to do a spot check safety tour at least 12 times a year at any given location.

First Transit shops hold a monthly maintenance safety meeting. They look at injuries and accident trends across the company, region, and location to discuss ways to prevent further incidents. The Maintenance Manager holds this mandatory meeting for all maintenance employees.

CORE 5 – SECURITY AWARENESS

We are keenly aware of security threats that exist in our current culture. Our management and staff are trained to closely scrutinize the security of our buildings, facilities, and vehicles always, promptly reporting of any inconsistencies or identifiable threats.

Protecting our facilities takes more than fences, security cameras, and proper lighting. Our approach to protecting our facilities includes an overall sense of awareness on the part of our employees. Our staff always handles securing all facilities and maintaining a heightened sense of awareness.

All visitors, vendors, and suppliers who enter our facilities should be scrutinized. Although we want to maintain a reasonable level of trust in those who do business with us, our employees recognize that any person who enters a facility on a temporary basis has the potential to be a security risk.



TRANSIT AUTHORITY OF RIVER CITY (TARC)—LOUISVILLE, KY

When First Transit took over the TARC contract from a competitor the safety statistics were well below the client expectations. With 80% incumbent drivers, First Transit took on the challenge of improving safety as quickly as possible.

Through focused retraining and numerous safety campaigns, the TARC location saw a 60% reduction in accidents and incidents in just five months.

The location received First Transit's company wide Safety Award for their dedication and incredible improvement in such a short time.



CORE 6 – ACCIDENT AND SAFETY DATA ACQUISITION

Our regard for the safety of our passengers and staff is paramount. Any injury, collision, or incident involving a First Transit driver will be investigated to find cause and responsibility. Investigations are performed in any situation when a vehicle is damaged, a vehicle leaves the traveled roadway, or a passenger or driver is injured.

If a driver is involved in a preventable injury or collision, he or she is placed on administrative leave pending the outcome of the investigation. Unbiased management personnel conduct all investigations. At the end of the investigation, action is taken, which may include a written warning, retraining, a suspension, or termination. If a settlement is necessary, we coordinate the efforts of insurance companies, maintenance personnel, and our management to ensure that we reach a prompt, fair agreement that protects the interest of First Transit and our clients.



H. WORKFORCE MANAGEMENT PLAN

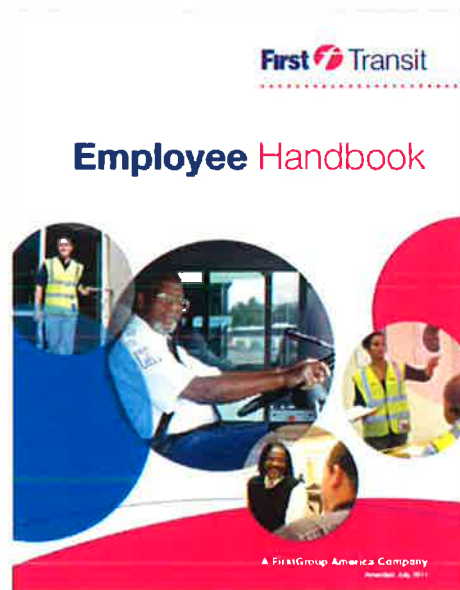
Describe the operating procedures and tools that will be put in place to manage the work force. Include a description of internal policies and procedures including those related to codes of conduct, dress codes, etc. A copy of personnel policies and procedures should be included in this section.

WRITTEN STANDARDS OF CONDUCT AND REQUIRED PERFORMANCE

The very nature of our business – serving the public – requires us to act with the utmost integrity. When an employee is subject to discipline, the employee's total work record, including all violations, is reviewed before determining any penalty. However, there are certain forms of conduct and violations of First Transit policy that are so serious as to result in discharge for a first occurrence, regardless of the employee's previous work record. Penalties for violations of multiple safety rules occurring during a rolling 12-month or 36-month period are addressed at the discretion of management. The seriousness of the violations is also a factor.

First Transit's Employee Handbook contains descriptions of offenses particular to our drivers and safety-sensitive employees, along with a comprehensive list of unacceptable employee behaviors. The following is a partial list of conduct violations that may be cause for discharge after a first offense:

- Violation of First Transit's drug and alcohol policy
- Falsification of employment application or other First Transit document
- Dishonesty or stealing from First Transit, coworkers, or Monterey Park's
- Misuse of First Transit's computer resources, including email, internet, and unauthorized or improper access or use of First Transit data or software
- Immoral, illegal, or indecent conduct that could or does reflect on First Transit
- Unauthorized use of a First Transit or Monterey Park vehicle
- Harassment or inappropriate conduct in the workplace
- Fighting or other acts of violence while on duty, on First Transit or Monterey Park's property, or in uniform
- Possession of weapons or explosives on First Transit or Monterey Park's property
- Insubordination, failure to follow instructions, or defiance of instructions
- Failure to immediately report a First Transit or Monterey Park vehicle collision



- Failure to report any charge, arrest, indictment, incarceration, or conviction for any felony or misdemeanor, or any sexually-related offense
- Smoking in dangerous, non-smoking areas such as fueling areas

An employee with knowledge of any actions prohibited by First Transit's policies or guidelines should report that activity immediately to his or her manager, any First Transit manager, the Ethics and Compliance Hotline, or by email. Suspected violations may be reported on a confidential basis, and First Transit will maintain confidentiality to the fullest extent possible.

We will not retaliate against or impose any other form of retribution on any employee as a result of his or her good faith reporting of another person's suspected violation of First Transit or Monterey Park policies or guidelines. Any suspected violation of First Transit or Monterey Park policies or guidelines will be reviewed by First Transit and Monterey Park, and, if appropriate, law enforcement authorities will be notified of the facts.

DRESS CODE

The appearance of our staff has a direct impact on the image of First Transit and Monterey Park. We expect that all employees in all positions present a professional image. Attire should be proper for the duties performed, and guidelines differ for office staff and service personnel. In general, all clothing should be clean, pressed, and in good condition. Hair should be neat, clean, and well groomed, and jewelry should not be excessive.

Employee Appearance – Our employees will present a neat, professional appearance at all times. Our staff – including drivers and operational supervisors – will wear proper uniforms and identification badges while on duty. We give uniforms to all staff that have direct contact with passengers. Adherence to set uniform policies, which are included in our employee handbook and discussed during training sessions, is checked by our supervisory staff during driver check-in procedures and during their contact with drivers. **No driver can be on route unless their attire meets these standards.**

- **Badges** – All First Transit employees are assigned a photo identification card as part of injury prevention standards. Each photo ID includes a photograph of the employee, name, job title, location, badge number, and issue date.
 - Photo ID cards are issued within one month of hire, and are kept by employees until they end their employment or are requested to surrender





their photo ID. Employees must display their photo ID while performing official duties either in a lanyard pouch, a clear pocket on a safety vest, or in some other visual manner.

- **Required Vests** – All First Transit employees must wear our high-visibility safety vests in the operations and maintenance areas. This is to ensure that everyone is seen easily and may work in a safe environment.

HUMAN RESOURCES RECORD KEEPING

First Transit considers the information included in employee records to be of a personal nature. It is our policy to maintain all HR and Safety records in an organized, professional manner, complying with all laws and regulations regarding filing, access, confidentiality, security, availability, and retention. All files are maintained in a secure, locked area with access limited to authorized employees only.

NEW HIRE FORMS

Federal, state, and local laws require us to gather important information during the hiring process. Our hiring managers work with all new employees to fill out, sign, and process forms in accordance with these regulations. An acknowledgement and receipt form is then signed as confirmation that required documentation has been received, read, and understood by the new employee.

New hire forms include:

- Interview candidate impression form
- Offer letter
- Signed and completed application for employment
- W-4 form (current)
- Affirmative Action and EEO policy (disabled veterans, included)
- Cell phone policy
- Code of business conduct (non-operator positions)
- Employee handbook / operators supplement
- Freedom of association
- Harassment free workplace policy
- USIS consumer report and DOT drug and alcohol release
- Summary of rights under Fair Credit Reporting Act
- I-9 form and required documents
- State of California Requirements:
 - State disability pamphlet
 - Paid Family Leave pamphlet
 - Worker's compensation pamphlet / pre-designation form

- Sexual harassment policy

SECURE FILING

All personnel files are internally audited to assure full compliance and confidentiality. Should any errors be discovered during an internal audit, a rating of “weak” (meaning “failure”) is given to the non-compliant location. At First Transit all files are confidential and are maintained in a secure, locked area and access limited to authorized employees only.

In addition, certain employee files must be maintained in a separate, secure file cabinet or location. These files include:

- Personnel file
 - Personnel section
 - Performance section
 - Payroll section
 - Attendance section
- I-9 binders (2) – active and inactive
- EEO applicant questionnaire file
- Medical file
- Safety file
- Substance abuse file
- Accident file
- Training file
- On-the-job injury (OJI) file

SAFETY FILE FOLDER – DRIVER QUALIFICATION FILE

- Federal law requires us to establish and maintain a **Safety File Folder (DOT - Driver Qualification File)** for all commercial driver’s license (CDL) holders. The following information must be included:
 - Copy of employment application
 - CDL physical exams and medical cards
 - Safety performance history records request (DOT accident history)
 - Complete and clear background check
 - CDL re-certifications / special certificate
 - Copy of current operator’s license
 - Record of road test, operator evaluation chart, annual evaluation
 - Proficiency report (California only)
 - Motor vehicle record (MVR) / pull notice
 - Annual record of violations provided and signed by operator
 - MVR from state (annual record or as required by client contract)



- Documentation of annual review of driving record by management
- Other information as per state-specific requirements

Our record keeping policies and practices are in compliance with all federal and state laws. We keep on file any employee benefit plans, and copies of any seniority systems and merit systems that are in writing, for the full period the plan or system is in effect, and for at least one year after its termination. Managers keep all files listed above in a secure location, locked in a file cabinet, accessible only to those with a need to know basis. According to federal law, we keep payroll and other records containing a name, address, date of birth, occupation, rate of pay, and compensation for four years.

I. SCHEDULING AND DISPATCHING

*Describe your method for scheduling and dispatching for the transit service.
Describe your method for schedule adherence.*

DOUBLEMAP CAD/AVL



DoubleMap's CAD/AVL system and its associated passenger modules and administrative reports is derived from thousands of data points every single minute. Predictions are calculated continually and are based on actual vehicle locations and a proprietary algorithm engineered by former Google employees to ensure accurate ETAs across a variety of conditions, seasons, and other natural traffic patterns. In order for the proposed CAD/AVL system to provide the most accurate reporting standards to the City of Monterey Park, DoubleMap's developers and operations staff must be supplied with specific route data across the entire transit system.

DoubleMap's CAD/AVL module is an Internet-based transit management and passenger information system and it adheres to National Intelligent Transportation System (ITS) architecture. The internal and external communication interfaces are fully compliant with N-tier web application technology standards, such as TCP/IP, SSL, JAVA, J2EE and FTP. The communications network between the system, the hardware, and standard DoubleMap passenger information display devices (signs) are compliant with GPRS data communication standards.

Such an open architecture it can be easily expanded and integrated to other systems. The prediction and message information is easily accessible to passengers through a variety of display devices, such as any electronic signs or passenger-facing kiosks. In addition, the resulting information including the real-time predictions, schedule adherence information and processed AVL data is available to the City of Monterey Park via a standard Internet browser interface.

First and foremost, DoubleMap's CAD/AVL was designed as a web-based software module, also referred to as Software-as-a-service (SaaS) application model. Using this model will

reduces the purchase of in-house equipment, software and support required by the City of Monterey Park to operate the system. DoubleMap data servers and networking equipment will reside across multiple geo-redundant, secure locations to ensure optimal uptime and security. Moreover, DoubleMap's SaaS model allows for continual enhancements and improvements, which are simply pushed to the City of Monterey Park, without the need of your IT staff's intervention.

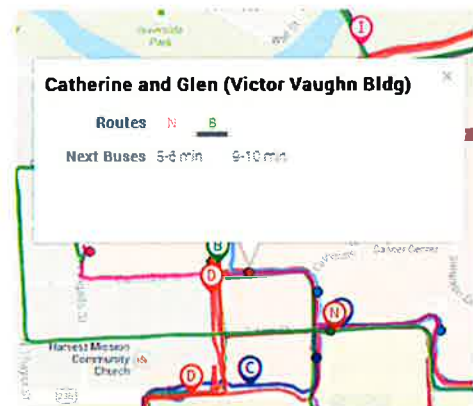
EMAIL SYSTEM

An email solution for reporting and dissemination of data can be provided via the DoubleMap architecture.

PUBLIC-FACING SOFTWARE

DoubleMap provides a cloud-based CAD/AVL application that operates in a web environment for both riders and administrators. DoubleMap is able to comply with the requirements to provide desktop software, application software, and an email system, but the core service only requires high-speed internet access (DSL/Cable or higher) in order to function.

Our engineers hail from the Google Maps team, so each module that will be provided will be fully compliant with the gold-standard mapping service. As a result, the DoubleMap public interface was designed using cutting-edge technology (Html5 and Google Maps V3) in order to provide a cross-platform solution for all major mobile platforms. **It works no matter what browser the user has, and if the user accesses via smartphone – the map architecture automatically optimizes to fit every phone.**



CAD/AVL ADMINISTRATIVE SOFTWARE

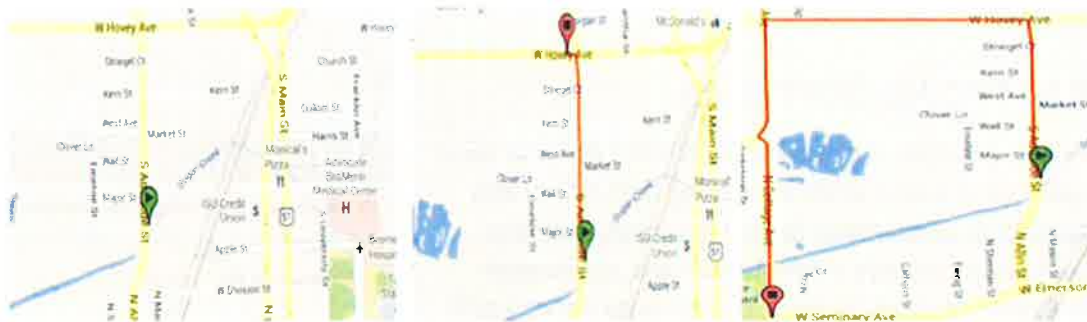
DoubleMap's CAD/AVL system stands out immediately upon first sight. The visual route and stop creator – which allows for unlimited, immediate bus stop nodes and route revisions. the City of Monterey Park's administrative staff will be able to use a simple point-and-click interface to adjust routes and add bus stops instantly, eliminating the need to print out paper maps and waiting weeks for the changes to take effect.





Through the use of Google Street View and Google Maps architecture, the City of Monterey Park can make unlimited stop additions/adjustments with pinpoint accuracy in addition to the route management suite.

The route creator is based on a point-and-click system, which does not require any knowledge of coordinates, or programming. Users simply login to the DoubleMap administrator interface, select a route they would like to edit, or start with a new route. The administrator clicks a point on the map and proceeds to click along the desired route – the DoubleMap system will automatically connect the points and extract the GPS coordinates.



PASSENGER ALERTS

DoubleMap is able to deliver a robust alerts system within its mobile application, which include reminders and notifications, so that riders can have further access to timely transit data. Riders will be able to create a personalized schedule within DoubleMap to receive recurring notifications of buses arriving at pre-selected bus stops on times and days of the week that they select.

For example, a rider may get a passive notification on their iPhone when a bus is 5 minutes away from a selected bus stop on Route 3 every Monday, Wednesday, and Friday.



DoubleMap's system will also allow users to create login accounts (using existing Google, Facebook, etc.) to synchronize their alerts across multiple platforms. This will allow a user to create see and manage their desktop alerts from their mobile device, and vice versa.

Users will also be able to manage the types of alerts they receive from each device. For example, a rider may enable an SMS alert from their web browser, or add an additional SMS alert from their web browser.

ESTIMATED TIME OF ARRIVAL

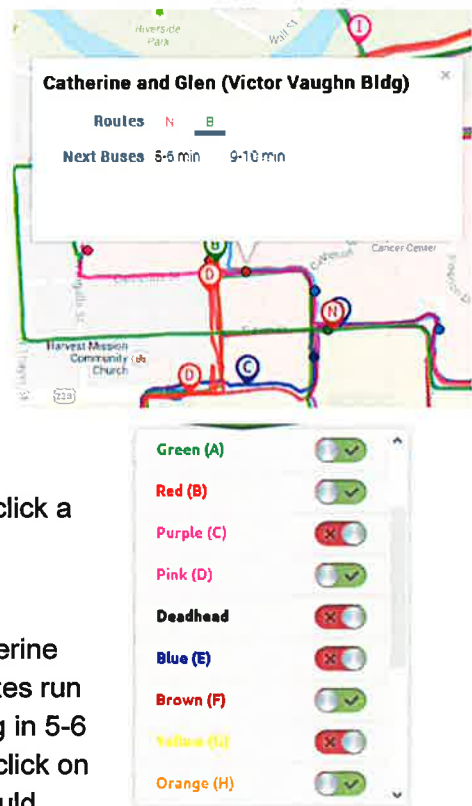
DoubleMap was designed by former Google engineers, and utilizes Google Maps throughout its rider and administrative applications.

The DoubleMap interface allows riders to easily identify buses by route – using color coordination and abbreviated route letter (or number, ID, etc.) within each bus icon. Additionally, riders can hover over a route outline to bring the desired route to the foreground for full path identification. Finally, riders can click the green check marks next to any route on the top right-hand corner of the page to quickly isolate any number of desired routes.

When riders hover over a stop to retrieve the name of it or click a stop to find out which routes pass through it, the respective estimated time of arrival appears.

In this scenario, a rider has clicked on the bus stop at Catherine and Glen. The rider can now see that both the N and B routes run through this stop, and that the next two B buses are arriving in 5-6 minutes and 9-10 minutes respectively. If the rider were to click on the red N within this balloon, then the arrival predictions would reflect the next two N buses.

Additionally, DoubleMap has added features such as the ability to remember the last route(s) that riders used in order to only load data that is important to them. This functionality can also save map positions, and zoom levels.





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MAINTENANCE PLAN

Describe in detail the elements of your maintenance program, including, but not limited to, preventive maintenance, daily inspections, record keeping, staffing, road call procedures, and availability of back-up vehicles.

PROTECTING MONTEREY PARK'S INVESTMENT AND ENSURING FLEET RELIABILITY

With over 60 years in the transportation business industry, operating and maintaining a wide array of transit buses and vehicles, First Transit has found the best fleet practices to ensure safe and reliable vehicles, and has created the most innovative solutions to support our maintenance approach. At First Transit, we take immense pride in our well-earned reputation for high-quality vehicle maintenance and our commitment to enhancing the safety, reliability, and cost effectiveness of our operations by taking excellent care of the fleets we service.

We understand how the unique nature of Monterey Park's topography effects the City's vehicles. We understand, too, that three new vehicles have been added to the fleet...assets that First Transit pledges to protect by leveraging our vast knowledge of maintenance best practices.

Together, FirstGroup America takes responsibility for the safe operating condition and asset lives of over 110,000 vehicles and equipment, making our industry-leading company an exceptional partner for the maintenance of the Monterey Park fleet. Nationwide, First Transit manages and uses more than 13,000 vehicles, in addition to our First Vehicle Services' division performing direct maintenance on over 37,000 vehicles.

Our successful Maintenance Program increases miles per road call on First Transit-maintained fleets with a commitment to strive for 100% compliance with all preventative maintenance. With our comprehensive program, most of the maintenance performed is scheduled work, improving the customer experience, and saving our clients' money. We commit to taking the best care of the fleets we maintain, extending their useful life, and making sure that Monterey Park gets the most out of their investment.

First Transit's comprehensive and effective maintenance plan includes:

Keys to Maintenance Excellence	
Rigorous Preventative Maintenance Inspections	First Transit's FirstBase Maintenance Information System schedules preventative maintenance for each vehicle. Monterey Park will have access to this system for complete transparency of our maintenance program.
Results-Driven Management	Our Maintenance Manager, Miguel Moreno, has 17 years of maintenance experience and will ensure an effective and efficient



	maintenance program for Monterey Park. He is supported by region and corporate experts in vehicle maintenance.
Effective Communication	Our Paperless Shops streamlines communication in the maintenance department, equipping our technicians with tablets so job assignments and recordkeeping are seamless. They have access to essential information like vehicle specifications, work history, manuals, etc., at their fingertips.
Roadcall Management	First Transit sends a trained technician when a vehicle experiences any type of service failure. Our priority is returning safe service to any impacted passengers.
Comprehensive Skills Assessments & Custom Training	Each technician has a customized training program developed by Cengage. First Transit places an emphasis on technicians becoming ASE certified. We pay for our technicians' training and testing and compensate them with hourly bonuses for certification. This customized training ensures that the maintenance staff can troubleshoot effectively, and it increases productivity because they make repairs right the first time.

In every First Transit location across the globe, where we care for fleets of diverse sizes from just a few vehicles to hundreds of vehicles, we supply our passengers and clients with expert care and detailed attention that comes with being the best in the business.

PREVENTATIVE MAINTENANCE PROGRAM

The backbone of First Transit's maintenance operation is our strong Preventative Maintenance (PM) Program. Proper PM will protect Monterey Park's capital investment in the fleet, keep the available fleet operational, and provide a prominent level of safe, reliable transportation to our passengers.

To ensure accurate and reliable data, we use:

- **FirstBase equipment management system** that enhances equipment management capability. FirstBase is a system focused on properly structured information to improve the quality and productivity of equipment services.
- **Tablets equipped with our Paperless Shop program**, allowing technicians to access a vehicle's history, updated maintenance procedures, and all required forms at their fingertips.

PREVENTATIVE MAINTENANCE INSPECTION

Every First Transit vehicle undergoes thorough PM inspections to be in top condition. Routine inspections and necessary repairs follow all OEM specifications.

We categorize PM inspections into three designations: A, B, C, and D inspections. Mileage intervals for Monterey Park's vehicles are performed every 45 days, or as-follows:

Inspection	Interval	Description
A	3,000 miles	Includes an oil change, lube service and a general inspection of all major areas as outlined on the PM checklist
B	6,000 miles	Incorporates all the requirements outlined for the "A" inspection plus additional checks to some of the major areas of the vehicle, including replacement of fuel filters
C	24,000 miles	Includes the requirements as outlined on the A and B PM's plus additional detailed checks into the major areas of the vehicle, including the replacement of transmission and engine air filters
D	48,000 miles	Includes the requirements as outlined on the A, B, and C PM's plus additional detailed checks into the major areas of the vehicle, including replacement of all fluids and filters

THE PREVENTATIVE MAINTENANCE PROCESS

First Transit encourages all employees who have contact with vehicles to be a part of our preventative maintenance process. Utility workers and other workers who have daily contact with vehicles check vehicles for any potential maintenance needs. By finding issues during service inspections, First Transit ends last-minute repairs that can result in service delays.

PM TASKS

Our technicians ensure all systems are in safe operating condition before a vehicle enters service. The PM process includes, but not limited to, inspecting any necessary repairs to the following systems:

- **Air Conditioning and Heating:**

The entire system undergoes detailed inspection and cleaning to ensure performance prior to peak air conditioning and heating seasons. We follow all applicable regulations, including those outlined in the Clean Air Act of 1990.





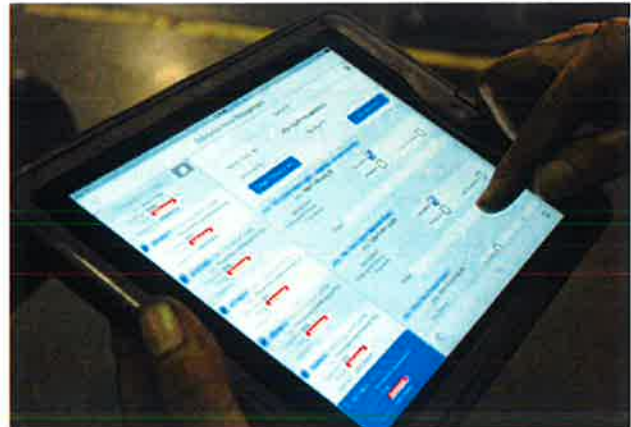
- **Brake Systems:** Any defects or other safety-related system issues are corrected with OEM quality parts, or approved equivalent parts, and tested prior to service.
- **Tires:** We only use branded tires (Michelin, Bridgestone, and Bandag) on our vehicles. The PM process for tires includes (as necessary): tire mounting and dismounting, wheel inspection, wheel and tire installation, in-shop tire and wheel installation, and tire tread depth inspections.
- **Wheel Chair Ramps and Lifts:** Technicians lube the lift and perform a comprehensive inspection of the entire system, including the platform, sensors, barrier, securement devices, and controls, paying attention for structural deficiencies and hydraulic leaks. Drivers cycle all lifts and ramps daily before vehicles enter service.
- **Fluid Replacement and Lubrication:** We perform all lubrication, oil, and filter change intervals per OEM and Monterey Park specifications. Additionally, we regularly check engine oil, transmission fluid, coolant, and differential fluid levels.
- **Communication Systems:** We remove any unit not working from service at once. We repair defective units under warranty by a manufacturer-approved shop to adhere to warranty requirements. Qualified vendors or employees repair items no longer under the manufacturer's warranty.

After the PM inspection is complete specialized technicians receive assignments for any necessary follow up repairs. Vehicles return to revenue service after a technician completes all follow up repairs.

PAPERLESS SHOP

First Transit offers an innovative approach to the typical maintenance workflow through our **Paperless Shops** initiative, which was introduced into the Monterey Park operation in Spring of 2017. In a typical shop, a paper work order is on average touched 10 times before maintenance resolves the issue. Our paperless shops streamline the process by offering all forms, work orders, and tasks via tablets.

- Employees can document preventative maintenance inspections and record maintenance functions and work orders from anywhere in the shop on tablets.
- Tablet usage facilitates correct documentation by storing the data directly into FirstBase. This is a quicker way to fill out forms and ensure the accuracy of information for future repairs and client reporting.
- Complete all follow up work orders from the tablet, ending the need for extra forms and processing time.



- Parts are pre-assigned to jobs and technicians can easily sign out parts on the tablets, which helps in inventory control and creates a seamless process for inspections and repairs.
- Supervisors plan their work based on KPI data loaded onto the tablets from FirstBase, showing them average work time and the number of vehicles out of service, awaiting parts, and other key factors for daily scheduling.
- Technicians get tasks assigned via tablets. By reviewing their days' work assignments on the devices, allows technicians to check-in for the day and easily see schedule changes as they occur in real time.
- Technicians log into specific jobs and log out when finished, giving exact time logging for each task.

Technicians log into specific jobs and log out when finished, giving exact time logging for each task. "The benefit of having the tablet is being more organized and easier navigation through activities. They also make it easy to read other technician's notes which makes me more productive as a technician." –Technician at our location in Tempe, AZ.

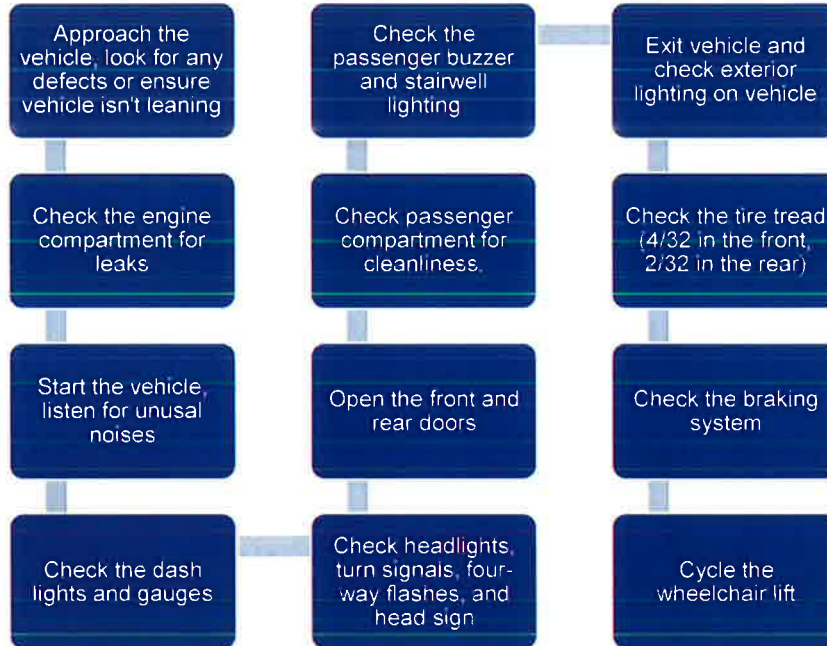


DRIVER PRE-TRIP INSPECTIONS



At First Transit, safety is our priority every day, the safety of our passengers, our employees, and the public. That is one of the few reasons we have our Drivers inspect their vehicles daily prior to ever leaving the lot. We take this Daily Vehicle Inspection Report (DVIR) seriously. We have Supervisors checking the Drivers perform this DVIR quickly and efficiently, to not delay on time pull-out, but also to ensure they are really checking the entire vehicle, and not just checking

a box. The DVIR is the first place to catch maintenance issues before they become a safety concern and a costly repair. Vehicle inspection should be an ongoing process. The inspection begins before the driver sets out on his/her route. While in route, Drivers should be aware of any changes in the vehicle's performance and make note of any problems. At the end of the trip, Drivers fill out the DVIR, adding any problems noted during, or at the end of the trip. The general steps of the inspection are as follows:



DRIVER VEHICLE CONDITION REPORT

The daily vehicle inspections conducted by our drivers are critical to achieving and maintaining First Transit and Monterey Park standards of excellence. We emphasize the importance of the operator's role within the maintenance process in driver training and refresher courses. The operator's responsibilities include:

- The pre-trip inspection and the legal requirement to complete the daily vehicle inspection accurately
- The documentation of any abnormal noise, vibration, or smell during operation recorded in the driver's report
- The post-trip inspection, completed as the operator shuts down the unit and does a final interior and exterior inspection

If a vehicle fails, its pre-trip inspection then on-site maintenance staff will come assess the vehicle prior to pull-out. Maintenance will notify dispatch if the repair will take longer than a few minutes and a pre-tripped bus will go into service.

MANAGEMENT OF THE MAINTENANCE PROCESS

RIGHT PEOPLE

With more than 60 years of industry leading experience First Transit employs tried and true practices for our maintenance program. However, we realize that none of these approaches or tools matter without the right team to implement them. Our maintenance staff of technicians, supervisors, and utility workers will have a strong leader in our Maintenance Manager, Miguel



Moreno. Please see our Operations Plan, Section B – Management Plan to find out more about Miguel. He handles the operations in maintenance as well as uphold Monterey Park’s goals and expectations.

Miguel works with Cengage in creating a customized training program for each of the technicians, ensuring that they are getting the best training possible. This leads to technicians getting repairs right the first time, as well as helps them become ASE Certified, as designation we take seriously. We strive for ASE Certification and provide a bonus program for every technician that becomes an ASE Master Certified Technician.

He has the support of an experienced regional management team that provides direct support to the location, as well as support from corporate staffing. Please see Section B – Management Plan of our Operations Plan to find out more about these key team members. Our recruiting team only seeks out and helps hire the most qualified of candidates, ensuring that Monterey Park receives only the best from First Transit’s local team. We are ready to provide industry-leading maintenance service to Monterey Park’s existing fleet of vehicles.

FIRSTBASE, POWERED BY INFOR

FirstBase Maintenance Information System (FirstBase) is our software platform for vehicle maintenance files, reporting, and task supervision using our Paperless Shop system. A transit-specific software designed for the unique requirements of a bus fleet, FirstBase captures and supplies critical data to support day-to-day management decisions. This gives our maintenance team the information needed to keep each Monterey Park vehicle in “like new” condition.



FirstBase is a flexible system that simultaneously tracks and monitors the following maintenance activities:

FirstBase Component	Description	Benefits
Task Scheduling	Schedule PM automatically, based on processes defined for vehicle classes or individual units. Separate tasks by priority, such as critical work orders and routine tasks.	Reduces vehicle downtime by regularly scheduled PM and making allowances for unplanned repairs.
Fuel Management	Integrates with leading fuel-management systems to report onsite fuel inventory, support data for off-site fuel purchases,	Effective fuel management means cost savings.



	and manage the use of fuel on revenue versus non-revenue vehicles	
Warranty & Roadcall Management	Track warranties, recall campaigns and related data. Users can query the database by VIN for affected units by specific road calls and issue work orders.	The system allows flexibility in management of warranty data.
Parts Inventory	FirstBase includes comprehensive parts inventory data management that supports purchasing, inventory tracking, and transfer, location-level data, and similar information.	Automated parts ordering and requisition saves money and time.
Fleet Performance Reporting	FirstBase can generate real-time, on-screen reports in several industry-standard categories. Reports track costs per vehicle, driver, location, and equipment type.	This is an essential tool for planning vehicle lifecycle optimization and replacement timelines
Benchmarking	At the close of every month, the maintenance department reports on more than 30 performance statistics.	Monthly comparisons between locations help find trends in maintenance and prevent vehicle downtimes and unscheduled maintenance cost

We implement FirstBase in all our maintenance shops to allow our region and corporate teams to develop trend analysis reports across similar contracts and vehicle types. FirstBase works hand-in-hand with our Paperless Shops platform, providing a state-of-the-art MIS system at our maintenance team's fingertips. Utilizing FirstBase, Miguel will review monthly reports to compare statistics between First Transit locations and to find any recurring maintenance trends.

MAINTENANCE PLANNING/SCHEDULING

First Transit uses maintenance planning tools to set efficient schedules and monitor technicians' time effectively. Supervisors plan weekly schedules based on vehicles scheduled for maintenance and an analysis of vehicles needing other repairs. Our technology allows for alterations on a shift-by-shift basis to account for changes in the schedule.

The following chart outlines the tools First Transit uses to plan effective maintenance schedules:

Software	Maintenance Planning Function
FirstBase	Schedules PM inspections automatically, based on processes defined for vehicle classes or individual units

	Generates reports that document equipment due for PM and sort it by company, region, department, or location
Paperless Shops	- Gives supervisors real-time information on the number of vehicles in the shop, vehicles waiting for parts, and vehicles due for maintenance - Allows supervisors to assign tasks onto technicians' tablets and easily make changes to daily schedules - Offers an effortless process for technicians to set up follow up repair notices via tablets

INVENTORY CONTROL

First Transit meets our commitment to exceed your standards for on-time performance and productivity by ensuring the Monterey Park fleet is safe and ready for service each day. Having the right parts for preventive maintenance and unscheduled repairs is a critical part of our business operations. We use our FirstBase to watch inventory levels and ensure the right parts are on hand to keep the fleet moving.

We follow these principles to manage our parts inventory most efficiently:

- Use OEM, or approve equivalent, parts
- Proactively manage stocking levels
- Organized parts storage
- Data-driven decisions



METHOD OF CONTROL

Our use of FirstBase software allows us to accurately manage our inventory levels, and proactively manage parts inventory. We enter every part we have into FirstBase with a preferred vendor, a backup vendor, alternate part numbers, reorder points, and restocking levels. All parts receive a label for the corresponding part and bin, to ensure organization and accuracy in our parts room. Maintenance staff stores parts in bins and arranges the bins in vehicle maintenance repair system code order.

Within FirstBase, we set up minimum and maximum inventory levels and choose a preferred vendor. A few times per week, our manager will run a requisition function in FirstBase for any part in the inventory that has fallen below the set minimum. FirstBase will order the amount from the preferred vendor to bring the inventory to the maximum level.

As an added method of control, our shops perform physical inventory four times a year, and outside auditing firms randomly certify the physical counts. Maintenance staff will also perform cycle counts every week, counting a percentage of our inventory to verify quantities.

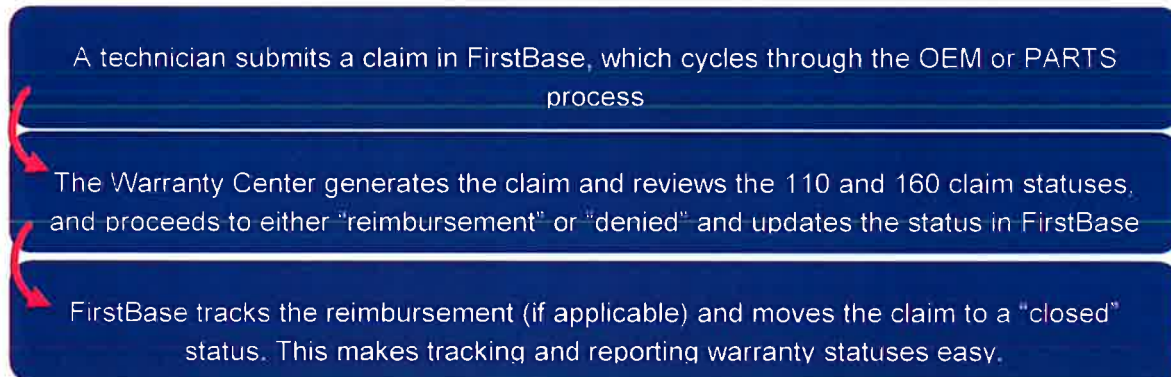


AIR CONDITIONING AND WHEELCHAIR LIFT PARTS AND MATERIALS

As with scheduled and unscheduled repair items, our parts inventory in FirstBase accounts for keeping adequate levels of all parts. Given the critical nature of both the air conditioning and wheelchair lifts, we keep the most commonly used parts in stock, which are readily available for use.

WARRANTY PROGRAM

First Transit offers our clients quality control for parts warranties through FirstBase, which allows us to easily track warranties, recall campaigns, and related parts data. Accurately and efficiently managing warranty claims improves the overall financial performance of the company, which is one of the primary obligations we have to Monterey Park. The process of a warranty claim in FirstBase is as follows:



Managing warranties and claims filed against those warranties is something we pursue with the help of our part manufacturers and vendors. We perform preventative maintenance and any unscheduled maintenance considering manufacturers' specific requirements for vehicles and components under warranty.

FirstBase is a highly flexible program customizable for each maintenance location. We can track parts expenditures, labor rates, warranty information, and other maintenance and repair data, and report it back to management and Monterey Park.

CORPORATE PURCHASING AGREEMENTS

First Transit can reduce maintenance costs through using our corporate buying power. As a maintenance contractor at a majority of our 335 locations, First Transit has a relationship with parts vendors providing us with buying power – an ability to bring Monterey Park quality parts at a lower cost.

We established Corporate Purchase Agreements (CPAs) with more than 100 vendors that represent 120,000 unique parts. This relationship with CPA's ensures that we get quality parts, best service, and competitive pricing. Our CPAs with major parts suppliers include Ford, Chrysler, General Motors, Cummins, Detroit Diesel, Freightliner, International/ Navistar,



Bridgestone, Firestone, Goodyear, Michelin, Bandag, AutoZone, Fleet Pride, NAPA, Barnes, Imperial Supplies, and others that offer significant pricing advantages. Most of the National CPA vendors we use offer parts and services through their network of local dealers. We will use other local vendors, whenever it is helpful and meets your needs, to provide parts and services.

MAINTENANCE QUALITY ASSURANCE

First Transit's quality assurance program in our maintenance shops increases fleet availability and reduces operational costs. Our region and corporate maintenance support teams stringently follow quality assurance processes to protect the long-term investment in the fleet.

FLEET RE-INSPECTION

We require each location to audit, at a minimum, 5% of its total fleet every month. The maintenance manager produces a report summarizing all collected data for each quality assurance inspection.

This monthly audit documents:

- Overall vehicle condition and trends
- Proper maintenance documentation
- Training or staffing requirements

The manager first audits the vehicle, using an extensive 40-point check sheet and a standard guide and rates the vehicle based on the inspection. If the manager finds any items that need immediate attention the vehicle is out of service until a technician signs off on completed repairs.

Next, the manager audits driver inspection reports and PM inspections. The manager checks that all the defects found in the past 14 days were completed or scheduled, then verifies that all repairs have been signed off by a technician.

The last step is to review the vehicle's past three PM inspections, verifying the timeliness of inspections and ensures that defects found underwent repairs. In addition, the audit helps show areas for technician training.

DESKTOP AUDITS

The electronic preventative maintenance (EPM) inspection is a series of reports that each First Transit location generates each quarter. The EPM offers a basic framework to spot maintenance trends, cost savings opportunities, and best practices for service efficiencies. First Transit's EPM includes:

- | | |
|--|---------------------------------------|
| • Improved customer service | • Less repairs between PM inspections |
| • Development of a proactive environment | • Organization of our work effort |
| • Increased productivity and efficiency | • Proper inventory levels |
| | • Reduce road calls |



Our Maintenance Manager, Miguel Moreno will analyze EPM reports for actionable trends and develop action plans for continuous shop improvement. A further audit conducted by First Transit's region staff reviews location action plans. This regional review compares the report to the previous EPM action plans to verify that all changes were implemented and the effectiveness of the plans.

ANNUAL SHOP AUDITS

Our internal audit process ensures that each location follows all best practices, policies, and procedures. It also establishes a company-wide standardized benchmark for quality, competence, and consistency.

Our region staff conducts annual audits on individual locations, completing a thorough review of all aspects of the operation. The audit includes:

- Inspection of 10% of the vehicles
- Review of warehousing efficiency, inventory, and stocking levels
- Compliance with preventative maintenance policies and standard operating procedures
- No deferred maintenance

After the audit, the region staff and Maintenance Manager develop an action plan with actionable deadlines to correct any deficiencies. Upon completion, the location is subject to a re-inspection to ensure quality maintenance operations.

FIRSTBASE AND KEY PERFORMANCE INDICATORS

FirstBase is a valuable tool for aiding with Key Performance Indicator (KPI) reporting to ensure the Monterey Park fleet is well-maintained and most of all safe for your passengers. Our database allows for continuous trend analysis of target benchmarks for maintenance activities.

KPIs analyzed through FirstBase include:

- Preventative maintenance
- Parts inventory
- Technician productivity
- Vendors for outside repair
- Fuel and oil consumption and efficiency
- Overhead costs
- Training Records
- Data validation checks at data input
- Status reporting
- Completed work orders
- Work orders in progress
- Delays and reasons for delays
- Tailored reporting
- Exception reports

CUSTOMER FIRSTBASE

First Transit will provide Monterey Park with a login to FirstBase to promote transparency in our operations. As your partner in operating these important transportation services, you have access to real-time information including:

- Key Performance Indicators
- Standard and custom reports
- Charts showing maintenance levels, times, and activities

First Transit uses this information as an added level of quality control. We proactively support any audits the Monterey Park wishes to administer using this information.

RESPONDING TO ROADCALLS

First Transit has a well-earned reputation for maintenance excellence with our preventative maintenance program. However, we understand that mechanical failures do happen, no matter how hard we try to limit them. We commit to maintaining on-time performance and exceptional service every day. When vehicles experience mechanical failures, we react with a sense of urgency but never lose focus on the safety of our passengers, drivers, and staff. Replacement vehicles help us resume normal route operations as soon as possible, while the regular vehicle is undergoing repairs.

First Transit's driver and technician training programs have helped create greater attention to detail during day-to-day operations. Our highly-trained drivers are the first line of defense for limiting roadcalls. Thorough pre-trip vehicle inspections, careful monitoring of bus performance during service, and final post-trip inspections often detect minor faults before they become expensive maintenance issues.

First Transit technicians take the crucial step of attending trainings to efficiently perform preventative maintenance. First Transit does not defer maintenance—reducing operating costs and leading to fewer vehicle defects.

In case of a road call, the following procedures take place:

Step	Task
1	The dispatcher records all pertinent information on a service interruption report. Dispatch passes the information on to the maintenance supervisor who records it in on a road call form. Information includes: • Driver name • Time of the incident • Location of vehicle and direction it was driving • Any input from the driver about the service failure • Remedial actions taken by the driver and results of those actions • Pertinent safety information Depending on the need dispatch will alert a standby vehicle that is pre-tripped and ready to resume service to minimize customer inconvenience
2	If the vehicle stalls, dispatch sends a tow truck rather than a technician



	If the vehicle does not stall but still is malfunctioning, the maintenance supervisor issues the road call form to an available technician who will leave the bus yard no later than ten minutes after notification.
3	Once the technician arrives at the scene and verifies the problem, he/she fills out a road call report, giving a brief description of the defects and the location of the vehicle. The technician and maintenance supervisor then decide on which of the following actions to take: • The vehicle returns to service if the technician does not find a defect, document the facts on the report and notify operations. • Return the vehicle to service if the technician succeeds in rectifying the problem in the field. • Switch out the vehicle in the event the repair would be too time consuming. ○ The vehicle will remain out of service in the maintenance yard until all repairs are complete and technicians have signed-off on the unscheduled maintenance.
4	The maintenance staff reviews monthly road call reports looking for areas of concern. A copy of the technician's repair order will be attached to the service interruption report help in the investigation process.

There are occasions when mechanical failures do not pose a safety risk to drivers and passengers. In those situations, we do the following:

- The driver informs dispatch of the problem while continuing the route
- Dispatch arranges an exchange with a spare vehicle. First Transit schedules a standby vehicle, which is staged at the Rowland Avenue facility, as a contingency plan to minimize lost service.

VEHICLE APPEARANCE

A dirty vehicle takes away from the positive image we want to convey to our passengers and the communities we serve. To preserve the favorable view of First Transit and Monterey Park, our service workers clean all vehicles operating in the fleet every second day (daily when needed). In locations affected by drought conditions, vehicles will be kept as clean as possible within water allocations and Monterey Park direction.

Our vehicles undergo these daily cleaning and washing procedures:



- Wash and scrub exterior
- Dust interiors
- Remove all trash from inside vehicle
- Sweep floor to remove all dirt, paper, etc.
- Wipe clean all stanchions and grab bars
- Wipe clean dash
- Clean interior windows, as necessary
- Clean side panels, as needed
- Remove any graffiti and insect remains
- Mop floor and step wells
- Repair/replace broken, cut, torn or vandalized components

GRAFFITI AND VEHICLE REPAIR

We have a zero-tolerance policy for graffiti and have instituted a program to detect and remove it from the interior and exterior of all vehicles. Our drivers and maintenance teams are committed to providing our passengers with clean, well-maintained, and graffiti-free vehicles.

Drivers perform pre-trip and post-trip inspections, paying close attention to graffiti that may negatively affect the appearance of our/Monterey Park vehicles. The driver notes any blemishes, scratches, or dents on the inspection reports and sent to dispatchers, who update the maintenance department with any necessary work orders related to the drivers' findings.

We fully commit to upholding the standards of Monterey Park and the requirements in your contract.



RECOGNIZING MAINTENANCE EXCELLENCE

First Transit takes immense pride in our industry-leading maintenance program. Our goal is to provide safe and reliable transportation services to all of Monterey Park's passengers. We strive to earn nation-wide maintenance recognition from these organizations to distinguish ourselves from our competitors.

ASE BONUS PROGRAM

Our employee incentive program promotes the development of our employees by rewarding those who achieve training milestones and keep their certifications current. First Transit is committed to training, and to the ASE certification program.



We believe that technicians completing training are more effective, efficient, and productive.

COMPENSATION STRUCTURE

Our ASE incentive program is designed to increase technicians desire to obtain certification, the testing for which is now provided in either English or Spanish. Offering access to all ASE testing at no cost to the employee, there are **two** ways that employees can earn per hour bonuses on each hour they work.

- While working to earn his/her first Master Technician Certification, the employee will receive a \$.15 per hour bonus for each ASE test successfully completed. Upon earning his/her first Master Technician Certification, the employee will receive an additional \$1.35 per hour.
- While working to earn his/her second Master Technician Certification, the employee will receive a \$.05 per hour bonus in addition to his/her regular rate for each ASE test successfully completed. Upon earning his/her second Master Technician Certification, the employee will receive an additional \$.05 per hour.
- Maintenance Managers earn a \$2,000-dollar bonus for receiving the Blue Seal Certification.

A complete breakdown of our ASE bonus program has been included as an Attachment.

LEAN MAINTENANCE PRACTICES AND 5S PROCESSES

Lean Maintenance Practices and 5s Processes are methods to improve overall effectiveness by valuing organization and ending waste. Lean processes translate to reduction in maintenance costs by targeting strategic areas where maintenance has direct and indirect control, such as preventative maintenance, road call reduction, over time and outside service costs.

Combined with Lean Practices, the 5s Process, (Sort, Straighten, Shine, Standardize & Sustain) is a workplace organization method that more effectively utilizes the space provided for maintenance, and generates a culture that promotes safety, quality maintenance, minimal maintenance cost, and improved vehicle reliability. The 5s Process focuses on the work environment to prevent lost time from unnecessary movement due to placement of repair parts, tooling, or fixtures that may impede travel by technicians.

MEASUREMENT OF PROGRAM EFFECTIVENESS

First Transit's FirstBase tracks key performance indicators to monitor program effectiveness and analyze trends including:

- Preventative Maintenance Compliance – Percent of PM inspections performed on time
- Technician Overtime – Percent of payroll paid for overtime
- Road Call Performance – Miles between road calls

- 
- Scheduled/ Unscheduled work – Percent of work that is scheduled work (PM, PM follow up) compared to unscheduled work (DVIR's, road calls)
 - Repairs between PM Inspections – Number of repairs between PM's (measuring the effectiveness of the PM program)
 - Technician Productivity – Comparing hours paid to hours charged to work orders
 - Hours over Standard Job Time – Technician hours that went over the standard job time
 - Auto-Reorder Percentage – Percent of parts ordered by the auto-reorder process
 - Outside Services Percentage – The percentage of maintenance cost spent at outside vendors
 - Overall cost per mile and comparison of cost per mile with similar fleets
 - Liquidated damages due to maintenance related issues

Local management and region teams oversee these processes, bringing value to our clients not only through cost savings but also improved fleet reliability, and improved customer satisfaction.

A complete breakdown of our Lean practices and 5s processes is included as an Attachment.

BACK-UP VEHICLES

In extraordinary occasions, a breakdown or other unpreventable event may occur that renders a vehicle inoperable. Should such an event occur, First Transit will dispatch immediately from the El Monte location its back-up vehicle that meets the same standards of safety, cleanliness, and reliability as the primary vehicle. We will notify the City of such an occurrence within 30 minutes.



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INSURANCE ADEQUACY

Provide evidence of the ability to acquire insurance with the type of coverage and insured amounts as detailed in Attachment A, Insurance Requirements.

As the incumbent contractor, sufficient insurance is already in place.

Please see insurance documentation on the following page.



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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
3/27/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Arthur J. Gallagher Risk Management Services, Inc. 250 Park Avenue 3rd Floor New York NY 10177	CONTACT NAME: Tanya D. Stephenson	
	PHONE (A/C, No, Ext): 212-994-7085	FAX (A/C, No): 212-994-7047
INSURED FIRST TRANSIT, INC. 600 Vine Street, Suite 1400 Cincinnati, OH 45202	E-MAIL ADDRESS: Tanya_Stephenson@ajg.com	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A: National Union Fire Insurance Company of Pittsburgh	
	INSURER B: New Hampshire Insurance Company	
	INSURER C: American Home Assurance Company	
	INSURER D: Commerce and Industry Insurance Company	
INSURER E: ACE Property & Casualty Insurance Co		
INSURER F:		

COVERAGES **CERTIFICATE NUMBER:** 1171093318 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR ☒ Abuse and ☒ Molestation Incl GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☒ PRO-JECT ☒ LOC ☐ OTHER: AUTOMOBILE LIABILITY ☒ ANY AUTO ☐ OWNED AUTOS ONLY ☒ HIRED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ NON-OWNED AUTOS ONLY		GL 3629890(10MM AGG)	12/31/2018	12/31/2019	EACH OCCURRENCE \$ 5,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 5,000,000 MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ 5,000,000 GENERAL AGGREGATE \$ 10,000,000 PRODUCTS - COMP/OP AGG \$ 5,000,000 \$ COMBINED SINGLE LIMIT (Ea accident) \$ 5,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
D	☒ UMBRELLA LIAB ☒ OCCUR ☐ EXCESS LIAB ☐ CLAIMS-MADE ☐ DED ☐ RETENTION \$		28295050	12/31/2018	12/31/2019	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$
B C B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N N/A	WC 014649551 (AOS) WC 014649549 (MA, WI) WC 014649548 (CA) WC 014649547 (FL)	12/31/2018 12/31/2018 12/31/2018 12/31/2018	12/31/2019 12/31/2019 12/31/2019 12/31/2019	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 5,000,000 E.L. DISEASE - EA EMPLOYEE \$ 5,000,000 E.L. DISEASE - POLICY LIMIT \$ 5,000,000
A E	Professional Liability Excess Liability		GL 3629890 G46844245 002	12/31/2018 12/31/2018	12/31/2019 12/31/2019	Per Occ./Agg. \$1,000,000 Each Occ/Agg. \$5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Workers Compensation:
Policy #: WC 014649550 (AK, AZ, IL, NC, NH, NJ, PA, UT, VA, VT)
Policy Term: 12/31/18 to 12/31/19
Carrier Name: NEW HAMPSHIRE INS CO (NAIC #23841)
Limits: E.L. Each Accident / E.L. Disease- Ea Employee / E.L. Disease-Policy Limit - \$5,000,000

See Attached...

CERTIFICATE HOLDER City of Monterey Park 320 W. Newmark Avenue Monterey Park CA 91754 USA	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
--	--

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AGENCY CUSTOMER ID: _____

LOC #: _____

**ADDITIONAL REMARKS SCHEDULE**Page 1 of _____

AGENCY Arthur J. Gallagher Risk Management Services, Inc.		NAMED INSURED FIRST TRANSIT, INC. 600 Vine Street, Suite 1400 Cincinnati, OH 45202
POLICY NUMBER		
CARRIER	NAIC CODE	EFFECTIVE DATE:

ADDITIONAL REMARKS**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,****FORM NUMBER:** 25 **FORM TITLE:** CERTIFICATE OF LIABILITY INSURANCE

Re: RFP for Fixed Route Transit Services

City of Monterey, its officials, and employees are included as additional insured(End't#83644/87950) as respects General and Automobile Liability coverage as evidenced herein on a primary/non-contributory basis as required by written contract with respect to liability arising out of the operations performed by the named insured under this agreement. Umbrella Excess Policy Follow Form. Waiver of subrogation included.

Notice of Cancellation: 30 days written notice/10 days for non-pay

FINANCIAL INFORMATION

Proposer should provide a minimum of two years audited financials for the company that will be contracting with the City for the transit services in this RFP. Provide letters from any creditors, banks, lenders, etc., to be used for the procurement of vehicles or facilities, or any other lines of credit needed to operate the services in this RFP.

FINANCIAL STABILITY

First Transit benefits financially from being part of an international transportation giant – FirstGroup plc. FirstGroup plc. operates five divisions that have similar core skills and expertise, diversified by geography, customer base, and mix of contract-backed and passenger revenue. This diverse business model further increases the stability of our corporation, ensuring that you will have a financially stable operator throughout this contract term and beyond.

FirstGroup plc is the leading transport operator in the UK and North America. With revenues of more than \$8 billion per year and more than 100,000 employees, we transport more than 2 billion passengers every year.



Our objective is to create long term value for Monterey Park and other local community stakeholders through sustainable, integrated transport services that are safe, reliable, and meet the needs of our passengers and communities.

The expansive size of our parent company, FirstGroup America – the North American division of FirstGroup plc, ensures that our Monterey Park operation will be based on financial strength and stability, which smaller transit contractors cannot provide.

First Transit's key characteristics for financial stability are as follows:

- A market leader in highly a fragmented \$30bn US transit marketplace – approximately 30% is outsourced
- Established credentials and proven track record in successful transit service across all operating divisions including fixed route, paratransit, demand response, shuttle, university, call center, and rail
- 335 transit locations across core business segments

The scale of our activities means that our core skills are employing and training professional, dedicated employees. We are **Committed to our Customers** and their safety; procuring, deploying and maintaining a wide variety of vehicle fleets and other physical assets. Our



financial strength and stability enables us to stand behind our proposal, and keep our commitments to you, our client.

We strive to improve Monterey Park's Fixed Route performance by sharing best practices across our businesses to provide high quality services that are safe, reliable, and meet the needs of the City's customers.



First Transit maintains a strong financial position that creates value to Monterey Park. We reinvest in our people, our operations, and the communities we serve.

FINANCIAL STATEMENTS

Included under separate cover are our most recent two years' audited financial statements for First Transit's parent company, FirstGroup America. There are no stand-alone audited financial statements for First Transit as it is a wholly-owned subsidiary of FirstGroup and included as part of the FirstGroup America annual audit. Additionally, please see a letter from our bank included as an Attachment.

These financial statements demonstrate that we possess substantial financial capacity and stability to fulfill our obligations under the terms of this RFP.

Further financial information is available on the web site www.firstgroupplc.com.



PRICE PROPOSAL SPREADSHEET

Complete the Price Proposal Spreadsheet (Attachment B) of the RFP to arrive at the cost of the services being requested by the City for each of the anticipated contract years. The City will pay the Contractor for Vehicle Revenue Hours provided. For the Fixed Route services Contractor must allocate cost components and then provide the total Vehicle Hourly Rate for the services requires using the following form:

Please find our completed Fixed Route Price Proposal (Attachment B), as well as Proposed Staffing (Attachment D), on the following pages.

FIRST TRANSIT, INC.
ATTACHMENT B
CITY OF MONTEREY PARK

COST PROPOSAL SPREADSHEET

This form identifies the key cost components for the operation of the Fixed Route transit service. This cost information will be used in the evaluation of proposals. On an attached sheet of paper, please indicate back-up calculations made in preparing all component costs.

CHARTER REVENUE VEHICLE SERVICE HOURLY RATE

(Total estimated annual hours - 200 hours)

\$ 51.34 per hour

HOURLY RATE COMPONENTS	FY 2019 - 2020	FY 2020 - 2021	FY 2021 - 2022	FY 2022 - 2023
	YEAR 1	YEAR 2	YEAR 3	YEAR 4
1. Operating Costs				
Operator Labor*	365,070.83	395,850.51	424,295.77	451,420.55
Supervisor/Dispatch Wages	110,853.60	114,345.49	117,947.37	121,662.71
Fringe*	173,551.02	184,619.26	195,945.95	207,492.86
Support Vehicle	9,296.42	6,361.28	7,039.53	7,344.48
Fuel	-	-	-	-
2. Maintenance Costs*	247,972.05	281,117.97	307,686.87	340,028.00
3. Administrative Costs*	56,728.63	93,482.80	118,452.94	130,026.08
4. Maintenance/Operating Facilities*	16,444.52	46,797.93	78,658.74	78,707.03
5. Insurance	55,694.31	59,308.98	62,985.44	65,907.87
6. City and Other Fees/Taxes	2,900.00	2,974.25	3,050.41	3,128.53
7. Capital Costs				
2011 Glaval Entourage	26,601.00	-	-	-
Technology-DoubleMap, DriveCam, Geotab	11,347.42	11,572.94	11,823.08	12,060.01
Shop Equipment	3,000.00	3,000.00	3,000.00	3,000.00
Office Equipment	2,264.86	2,264.86	2,264.86	2,264.86
8. Start-Up Costs	-	-	-	-
9. Profit	45,071.86	50,070.68	55,547.96	59,293.46
10. Other Costs (Describe Components)	-	-	-	-
11. Total Costs (Sum of Lines 1-10)	1,126,796.52	1,251,766.95	1,388,698.92	1,482,336.44
12. Vehicle Revenue Hours	19,000	19,000	19,000	19,000
13. Hourly Rate (Line 11 divided by Line 12)	59.31	65.88	73.09	78.02

* Additional detail provided on attached page.

FIRST TRANSIT, INC.
ATTACHMENT B
CITY OF MONTEREY PARK
COST PROPOSAL SHEET DETAIL

HOURLY RATE COMPONENTS	FY 2019 - 2020	FY 2020 - 2021	FY 2021 - 2022	FY 2022 - 2023
	YEAR 1	YEAR 2	YEAR 3	YEAR 4
Operating Labor				
Route Wages	332,308.67	356,053.55	382,968.40	406,713.28
Paid Time Off	27,368.32	31,664.45	34,449.24	37,534.71
Training Wages	5,393.84	8,132.51	6,878.13	7,172.56
Operator Fringe				
Taxes	77,059.54	83,384.86	89,557.64	95,717.93
Benefits	96,491.48	101,234.40	106,388.31	111,774.93
Maintenance Costs				
Labor	93,704.40	111,867.28	123,296.60	134,432.83
Taxes	15,790.79	18,321.05	20,251.40	22,187.71
Benefits	26,313.43	27,645.29	29,005.35	30,428.23
Parts & Services	104,863.43	115,765.35	127,388.95	145,002.32
Vehicle Body Repair	7,300.00	7,519.00	7,744.57	7,976.91
Administrative Costs				
Labor	29,852.15	54,830.81	65,932.57	76,567.99
Taxes	771.09	1,273.90	1,478.52	1,696.23
Benefits	2,392.96	3,019.02	3,327.67	3,651.47
Telephone	6,393.00	12,278.48	18,454.23	18,548.78
Misc. Office	17,319.43	22,080.59	29,259.95	29,561.61
Maintenance/Operating Facilities				
Lease Expense	12,720.00	39,114.00	66,819.75	66,819.75
Utilities	3,031.52	5,552.95	8,198.57	8,246.86
Security & Maintenance	693.00	2,130.98	3,640.42	3,640.42

FIRST TRANSIT, INC.
ATTACHMENT D
CITY OF MONTEREY PARK
PROPOSEDSTAFFING

Position Type from RFP	Contractor Position Title	Full Time # of Persons	Part Time # of Persons	FTE Hours (2080)	Average FT Annual Salary	FT % Benefits	Ave rage PT Hourly Rate	PT % Benefits
General Manager	General Manager (Shared)	1		104	\$90000	5.0%		
Operations Manager	Operations / Safety Manager (Shared)	1		2080	\$55000	71.3%		
Maintenance Manager					\$0	0.0%		
Safety and Training Manager					\$0	100.0%		
Road Supervisor	Road Supervisor	2		4160	\$ 31,200	100.0%	\$0	0.0%
Dispatcher	Dispatcher	1	1	3120	\$ 29,120	50.0%	\$14.00	0.0%
Bus Operator	Drivers	12		24,968	\$ 28,891	61.5%	\$0	0.0%
Other (specify)					\$0	0.0%	\$0	0.0%
Other (specify)					\$0	0.0%	\$0	0.0%
Maintenance Manager/Supervisor	Maintenance Manager (Shared)		1	350	\$ 3,500	50.0%	\$0	0.0%
Mechanics	Technician (Shared)		4	2912	\$0	50.0%	\$25.00	0.0%
Mechanic/Technician					\$0	0.0%	\$0	0.0%
Service Worker/Fueler	Utility (Shared)		1	1040	\$0	0.0%	\$13.00	0.0%
Maintenance Clerk					\$0	0.0%	\$0	0.0%
Other (specify)					\$0	0.0%	\$0	0.0%
Other (specify)					\$0	0.0%	\$0	0.0%
Transit Analyst					\$0	0.0%	\$0	0.0%
Customer Service					\$0	0.0%	\$0	0.0%
Administrative Asst/Clerk	Accountng Clerk (Shared)		1	104	\$0	0.0%	\$14.00	50.0%
Other (specify)					\$0	0.0%	\$0	0.0%
Other (specify)					\$0	0.0%	\$0	0.0%



ATTACHMENTS

1. CURRENT FIXED ROUTE CONTRACTS
2. TRANSITION AND START-UP ACTIVITIES
3. SAMPLE REPORTS
4. DRUG & ALCOHOL POLICY
5. PROOF OF CHP CERTIFICATION
6. PROOF OF REGISTRY (GOOD STANDING) WITH CALIFORNIA SECRETARY OF STATE
7. PROOF OF PARTICIPATION – CALIFORNIA DMV PULL NOTICE PROGRAM
8. MANAGEMENT RESUMES
 - a. BRENT JOHNSON, GENERAL MANAGER
 - b. JUAN CASILLAS, OPERATIONS & SAFETY MANAGER
 - c. MIGUEL MORENO, MAINTENANCE MANAGER
 - d. VALERIE LEYBA, ROAD SUPERVISOR
 - e. EZEQUIEL JIMENEZ, ROAD SUPERVISOR
 - f. CECILIA PACHECO, LEAD DISPATCH
9. JOB DESCRIPTIONS
 - a. GENERAL MANAGER
 - b. OPERATIONS & SAFETY MANAGER
 - c. ROAD SUPERVISOR
 - d. ADMINISTRATIVE CLERK
 - e. LEAD DISPATCH
 - f. DISPATCHER
 - g. VEHICLE OPERATOR
 - h. MAINTENANCE MANAGER
 - i. UTILITY WORKER
 - j. TECHNICIAN
10. ASE BONUS PROGRAM
11. LEAN PRACTICES AND 5S PROCESSES
12. BANKING RELATIONSHIP SUMMARY
13. PERFORMANCE BOND SURETY

CURRENT FIRST TRANSIT FIXED ROUTE CLIENTS

Client	Contact	Title	Address	Phone	Service	Fleet	Staff	Since
Steuben County Kings Point, Boynton Beach	Amy Dlugos	Senior Planner	1201 Clemens Center Parkway, Elmira, NY 14901	(607) 776-9631	Fixed Route	4	8	1/1/2000
	Lisa Manzione	General Manager	1220 West Industrial Ave., Boynton Beach, FL 33426	(561) 499-3335	Fixed Route	8	21	6/1/1992
Fort Bend County	Paulette Shelton	Director, Public Transportation	12550 Emily Court, Ste. 400, Sugar Land, TX 77478	(281) 633-7433	Fixed Route	10	4	1/1/2012
Washington County Transportation Authority FIXED	Sheila Gombita	Executive Director	50 East Chestnut Street, Washington, PA 15301	(724) 229-2502	Fixed Route	11	17	5/16/2011
Crescent City - Redwood Coast Transit	Mark Wall	Transit Manager	140 Williams Drive, Crescent City, CA 95531	(559) 734-2646	Fixed Route & Paratransit	14	27	7/1/2003
Lorain County	Pam Novak	Chief Finance Officer for Lorain County Transit	226 Middle Ave, Elyria, OH 44035	(440) 329-5525	Fixed Route & Paratransit	15	28	1/1/2009
Sun Trolley	Robyn Chiarelli	Executive Director	290 NE 3rd Ave, Ft. Lauderdale, FL 33301	(954) 494-9680	Fixed Route	16	30	7/1/2014
Delaware Transit Corporation Kent & Sussex County	Al Loyola	Contract Operations Manager	119 Lower Beech Street, Wilmington, DE 19805	(800) 355-8080	Fixed Route & Paratransit	17	33	9/24/2018
NYSDOT North Country Express	Bill Telovsky	Intermodal Transportation Specialist 2	27 Flanagan Drive, Plattsburgh, NY 12901	(518) 457-4401	Fixed Route	18	29	8/15/2005
Anoka County	Mark Schermerhorn	Transit Planning Assistant	1440 Bunker Lake Boulevard NW, Andover, MN 55304	(763) 324-3108	Fixed Route & Paratransit	19	49	7/1/1990
City of San Luis Obispo	Gamaliel Anguiano	Transit Manager	29 Prado Rd., San Luis Obispo, CA 93401	(805) 781-7121	Fixed Route	19	42	7/1/2001
City of Sierra Madre	Adam Matsumoto	Director of Community & Personnel Services	4337 Rowland Ave., El Monte, CA 91731	(626) 355-7135	Fixed Route & Paratransit	20	47	7/1/1997
City of Springfield	Mark Beckdahl	Finance Director	76 East High Street, Springfield, OH 45502	(937) 324-7309	Fixed Route & Paratransit	20	27	7/1/2011
City of Arcadia	Linda Hui	Transportation Services Manager	240 West Huntington Drive, Arcadia, CA 91007	(626) 574-5435	Fixed Route & Paratransit	20	47	9/1/2017
City of Monterey Park	Bonnie Tam	Transportation Manager	320 West Newmark Ave, Monterey Park, CA 91754	(626) 307-1458	Fixed Route	20	47	7/1/2015
City of Nashua	Camille Pattison	Transportation Manager	11 Riverside Drive, Nashua, NH 03062	(603) 821-2035	Fixed Route & Paratransit	21	29	7/1/2009
City of Independence	Tom Scannell	Community Development Director	111 E. Maple P.O. Box 1019, Independence, MO 64051	(816) 325-7087	Fixed Route	21	33	7/1/2012
River Valley Metro Mass Transit District	Robert Hoffmann	Managing Director	1137 E 5000 N Rd, Bourbonnais, Kankakee, IL 60915	(815) 935-1403	Fixed Route & Paratransit	22	56	7/1/2007
City of Vacaville	Lori Damassa	Transit Manager	1001 Allison Drive, Vacaville, CA 95687	(707) 469-6575	Fixed Route & Paratransit	26	34	8/1/2006
Yellowknife Transit	David MacMillan	Municipal Engineer	PO Box 580, Yellowknife, NT X1A 2N4 CAN	(867) 920-5638	Fixed Route	26	27	9/1/2007
University of Chicago - Transit Charter	John Hillesland	Contract/Sourcing Manager	6054 South Drexel Ave, Suite 300, Chicago, IL 60637	(773) 834-2714	Fixed Route	27	53	9/1/2006
BC Transit Duncan	Kevin Schubert	Director Regional Transit Systems	520 Gorge Rd East, Victoria, BC V8W 2P3 CAN	(250) 597-1130	Fixed Route	28	36	1/1/2008
Bay County Transit Planning Organization (TPO) Trolley	Angela Bradley	Transit Financial Manager	100 Richard Jackson Blvd, Suite 120, Panama City, FL 32407	(850) 236-8675	Fixed Route	28	31	7/1/2014
Chemung County	Tina Hager	Transit Specialist	1201 Clemens Center Parkway, Elmira, NY 14901	(607) 737-2031	Fixed Route	28	67	1/1/1988
City of Sandusky	Nicole DeFreitas	Transit Administrator	1230 Depot Street, Sandusky, OH 44870	(419) 621-8462	Fixed Route & Paratransit	29	40	4/1/2017

CURRENT FIRST TRANSIT FIXED ROUTE CLIENTS

Client	Contact	Title	Address	Phone	Service	Fleet	Staff	Since
San Diego MTS Minibus	Vassy Lerinska	Assistant Transit Operations Specialist	7490 Copley Park Place, San Diego, CA 92111	(619) 595-7038	Fixed Route	29	50	6/11/2011
Yamhill County	Cynthia Thompson	Transit Manager	535 NE 5th Street, McMinnville, OR 97128	(503) 474-4910	Fixed Route & Paratransit	30	40	7/1/2012
Cortland County	Dan Dineen	Planning Director	21 Squires St., Cortland, NY 13045	(607) 753-5043	Fixed Route	31	36	1/1/1993
Imperial County Transportation Commission	Kathi Williams	Senior Transit Planner	1405 N. Imperial Ave., Suite 1, El Centro, CA 92243	(760) 482-4462	Fixed Route & Paratransit	32	52	7/1/1997
BC Transit/Vernon Shuswap/RDNO	Kevin Schubert	Director Regional Transit Systems	520 Gorge Rd East, Victoria, BC V8W 2P3 CAN	(250) 995-5634	Fixed Route	35	63	1/1/2007
City of Pasadena	Valerie Gibson	Transit Manager	303 North Allen Ave., Pasadena, CA 91106	(626) 744-3725	Fixed Route & Paratransit	36	86	7/1/2001
Chenango County	R.C. Woodford	Clerk of the Board	126 Leilani Way, Norwich, NY 13815	(607) 337-1430	Fixed Route & Paratransit	39	74	4/1/1996
New York State Department of Transportation	Matthew T. Haas	Purchasing	1020 Center Street, Horseheads, NY 14845	(518) 457-1585	Fixed Route	41	13	1/1/2009
City of Fargo	Julie Bommelman	Transit Director, City of Fargo	650 23rd St N, Fargo, ND 58102	(701) 476-6737	Fixed Route & Paratransit	43	89	1/1/2007
City of Moorhead	Lori Vanbeek	Transit Director, City of Moorhead	650 23rd St N, Fargo, ND 58102	(701) 476-6686	Fixed Route	43	89	1/1/2007
NYSDOC-Inmate Movement	Doug Botsford	Director of Classification and Movement	1020 Center Street, Horseheads, NY 14845	(518) 457-8126	Fixed Route	43	22	10/1/1999
Metropolitan Tulsa Transit Authority	Regina Jackson	Contracted services director	510 S. Rockford, Tulsa, OK 74120	(918) 560-5603	Fixed Route & Paratransit	49	64	10/28/2018
City of Olean	Keri Kerper	Director of Community Dev.	Olean Municipal Bldg, 101 E State Street, Olean, NY 14760	(716) 376-5647	Fixed Route	58	64	6/1/2008
Allegany County	Timothy Boyde	County Administrator	7 Court Street, Belmont, NY 14813	(585) 268-9217	Fixed Route	58	64	4/8/1999
Seneca Nation of Indians	Angie Kennedy	Transportation Director	90 OH: YO' Way, Salamanca, NY 14779	(716) 945-1790	Fixed Route	58	64	7/1/2013
SouthWest Transit	David Jacobson	Chief Operating Officer	14405 W. 62nd St., Eden Prairie, MN 55346	(952) 974-3101	Fixed Route & Paratransit	59	57	5/1/1995
Puerto Rico Highway and Transportation Authority	Juan Moldinado	Executive Director	Zona Portuaria, Puerto Nuevo, PR 0920	(787) 774-2030	Fixed Route	62	97	1/1/1999
City of Rochester	Bryan Law	Transit Planner	4300 East River Rd NE, Rochester, MN 55906	(507) 328-2485	Fixed Route	63	83	7/1/2012
Denver RTD - Group 26 (Previously 22)	Greg Smith	Manager, Competitive Services	811 South Sherman, Longmont, CO 80501	(303) 299-2839	Fixed Route	76	157	1/1/2008
Two Rivers Transit Service	Bruce Dreier	Project Administrator	390 Robert Street North, St Paul, MN 55101	(651) 602-1709	Fixed Route	79	120	12/1/1996
Met Council MTS Small Bus	Rebecca McBride	Project Administrator	390 Robert Street North, St Paul, MN 55101	(651) 602-1722	Fixed Route	79	120	6/1/2014
Met Council East West Crosstown Area Transit Services	Bruce Dreier	Project Administrator	390 Robert Street North, St Paul, MN 55101	(651) 602-1708	Fixed Route	79	120	12/1/1996
City of Visalia	Cristine Chavez	Transit Manager	425 E Oak Ave Suite 301, Visalia, CA 93291	(559) 713-4334	Fixed Route & Paratransit	87	140	10/1/2018
Johnson County Transit	Josh Powers	Operations Manager	1701 West 56 Highway, Olathe, KS 66061	(913) 782-2210	Fixed Route & Paratransit	88	101	11/21/1991
BC Transit Kamloops	Kevin Schubert	Director Regional Transit Systems	520 Gorge Rd East, Victoria, BC V8W 2P3 CAN	(250) 828-3311	Fixed Route	88	134	1/1/1983
Eastern Contra Costa Transit Authority	Jeanne Krieg	CEO/General Manager	801 Wilbur Ave., Antioch, CA 94509	(925) 754-6622	Fixed Route & Paratransit	93	170	7/1/1986
Los Angeles Department of Transportation (LADOT)			100 South Main Street 10th Floor, Los Angeles, CA 90012	(213) 928-9745	Fixed Route	105	230	10/29/2017

CURRENT FIRST TRANSIT FIXED ROUTE CLIENTS

Client	Contact	Title	Address	Phone	Service	Fleet	Staff	Since
BC Transit Abbotsford/ Chilliwack/ Agassiz-Harrison	Kevin Schubert	Director Regional Transit Systems	520 Gorge Rd East, Victoria, BC V8W 2P3 CAN	(250) 995-5634	Fixed Route & Paratransit	114	201	4/1/2010
City of Plymouth	Nur Kasin	Transit Administrator	3400 Plymouth Boulevard, Plymouth, MN 55447	(763) 509-5013	Fixed Route & Paratransit	115	160	4/1/1989
Denver RTD Group 28 (Previously 24 & 20)	Greg Smith	Manager, Competitive Services	6345 N. Colorado Blvd., Commerce City, CO 80022	(303) 299-2839	Fixed Route	118	253	2/1/1989
BC Transit Kelowna Regional/Peachland	Kevin Schubert	Director Regional Transit Systems	520 Gorge Rd East, Victoria, BC V8W 2P3 CAN	(250) 995-5634	Fixed Route	127	255	1/1/2000
Cobb County Transit	Andrea Foard	Manager/Deputy Director	463 Commerce Park Drive, Suite 112, Marietta, GA 30060	(770) 528-1914	Fixed Route & Paratransit	129	261	3/26/2017
Snohomish County Area Public Transportation	Wade Mahala	Manager of Contracted Services	2300 Kasch Park Rd., Everett, WA 98204	(425) 348-7182	Fixed Route	132	219	6/9/1997
Denver RTD- Group 27 (Previously 23)	Greg Smith	Manager, Competitive Services	100 West 64th Ave., Denver, CO 80221	(303) 299-2839	Fixed Route	132	281	5/6/2007
Potomac and Rappahannock Transportation Commission (PRTC)	Bob Schneider	Executive Director	14700 Potomac Mills Rd., Woodbridge, VA 22192	(703) 580-6121	Fixed Route	154	245	7/1/2003
City of Phoenix	Edward Harrison	Operations Contract Supervisor	405 North 79th Ave., Phoenix, AZ 85043	(602) 534-9167	Fixed Route	168	375	10/31/2007
Houston Metropolitan Transit Authority (Fixed Route)	Auturo Jackson	Sr. Director of Customer Care	Po Box 61429, Houston, TX 77208	(713) 615-4208	Fixed Route	197	473	9/30/2007
El Paso County	Sal Alonzo	Civil Engineer	800 E. Overland, Suite 300, El Paso, TX 79901	(915) 546-2048	Fixed Route	241	5	8/18/2014
Orange County Transportation Authority (OCTA) Fixed	Beth McCormack	COO	600 S Main St, Orange, CA 92868	(714) 560-5783	Fixed Route	252	487	6/14/2015
Valley Metro RPTA - City of Tempe	Scott Smith	CEO	101 N 1st Ave, #1400, Tempe, AZ 85003	(602) 253-5000	Fixed Route	311	711	7/1/2013

City of Monterey Park - Mobilization Schedule	3-Jun-19	10-Jun-17	17-Jun-17	24-Jun-17	1-Jul-17
	1	5	6	7	8
Contractual					
Notice to Proceed					
Contract Negotiations					
Finalize and Sign Contract					
Circulate First Transit's Mobilization Plan					
Introduction of team members for Client and First Transit					
Review plan, contract requirements and expectations					
Develop and submit detailed work plans to Client					
Organize and Notify Start-Up Team					
Weekly progress meetings with staff					
Recruiting & Staffing					
General Manager On-Site					
Operations Manager On-Site					
Safety and Training Manager On-Site					
Maintenance Manager On-Site					
Regional Support Team On-Site, as needed					
Update contact numbers, emails, emergency notification tree					
Ongoing Recruitment Efforts					
Refresh DMV Checks for start of new contract					
Update Criminal Background checks					
Pre-employment drug testing and physicals					
Training & Course Development					
Prepare Training Plan and Materials					
Prepare Policy Manuals & Employee Handbook					
Refresher Training for Supervisors/Dispatchers - including new technologies					
Refresher Training for Maintenance and Utility Staff					
Refresher Operator Training					
New Hire Operator Training (ongoing)					
Operations & Administrative Procedures					
Finalize operating procedures & policies for new contract					
Review new performance standards					
Develop goals & objectives for the new contract					
Analyze Historical Data to Review schedules with the City					
Establish processes for data collection utilizing new technologies					
Review and implement forms for daily operations & reporting					
Review payroll and accounting procedures					
Review dispatcher/supervisor schedule					
Confirm Fare Accounting and Pickup Procedures					
Maintenance Procedures					
Review vehicle history files					
Review internal and external lot circulation, parking, fueling plans					
Review PM schedules					
Review daily, weekly & monthly report req's					
Vehicles & Equipment					
Inspect vehicles prior to initiation of service					
Third Party Inspection of Vehicles prior to contract start					
Acceptance of vehicles					
Facility					
Review functionality of phone / IT systems					
Review parking plan					

City of Monterey Park - Mobilization Schedule	3-Jun-19	10-Jun-17	17-Jun-17	24-Jun-17	1-Jul-17	
	1	5	6	7	8	
Confirm Fueling and Security Procedures with the City						
Finalize internal layout, space planning						
Finalize Maintenance shop layout, parts room						
Confirm all security requirements, key access, badges						
Order/Install upgraded Maintenance Equipment						
Order/Install upgraded Office Equipment						
Prepare Reporting Mechanisms						
Review emergency & procedural requirements						
Review processes for maintenance data collection						
Finalize Technology Implementation, including DriveCam SF64 and Doublemap						
Service Start - July 1, 2019						

Reporting Suite

DoubleMap is able to provide a full reporting suite for client administrators including a dashboard of canned reports as well as a Business Intelligence platform powered through Gooddata which allows for administrators to create custom dashboards and ad-hoc reporting for both a comprehensive and detailed look into aspect of the agency's service.

Canned Reports

The DoubleMap reporting module provides an extensive collection of management dashboard reports and is able to provide transit information in addition to other management reports. All reports are accessible through a web browser interface for viewing and accessing historical information in the internal database. The reports allow managers to gain greater insight and control over their plans, schedules and communications. For each report, the system presents a web page so that agency staff can access the system remotely.

DoubleMap reports will enable managers to improve a number of performance factors, including schedule adherence and headway management. For instance, schedule adherence reports will allow managers to maximize on-time performance, and provide the ability to drill down through multiple layers of data to get at the root cause of scheduling problems. Administrators can also look for patterns over a period of time or performance at a specific time. These tools are helpful for improving existing routes as well as planning future routes.

Reports

Categories	± EXPAND ALL
Summary Report	
Mileage Reports	
On-Time Reports	
Off-Route Reports	
Passenger Reports	
APC Passenger Reports	
Route Travel Time Reports	
Route Change Reports	
Driver Login Reports	
Speeding Reports	
Headway Reports	
GTFS Export	
Bus Arrivals/Departures Reports	
Raw GPS Data Reports	
Validation Reports	
Vehicle Inspections	
System Status	

Canned Reporting Categories

Passenger Reports

Passengers by Route

Daily passenger reports, organized by route

Passengers by Stop

Daily passenger reports, organized by stop

Passengers by Type

Daily passenger reports, organized by type

Passengers by Type and Route

Daily passenger reports, organized by type and route

Passengers by Type and Stop

Daily passenger reports, organized by type and stop

Passengers by Bus and Type

Daily passenger reports, organized by bus and type

Passengers by Bus and Stop

Daily passenger reports, organized by bus and stop

Passengers by Trip

Daily passenger reports, organized by trip

Passengers by Bus

Daily passenger reports, organized by bus

Passengers by Stop and Hour

Daily passenger reports, organized by stop and hour

Hourly Passengers

See passengers each hour of the day within a certain date range.

Passengers by Route Daily Averages

See average daily ridership by route

Bus Capacity By Trip

See highest percentage of bus capacity filled per trip

Card Reader Scans

Download a log file of card reader scans in the specified date range

Reports within Categories

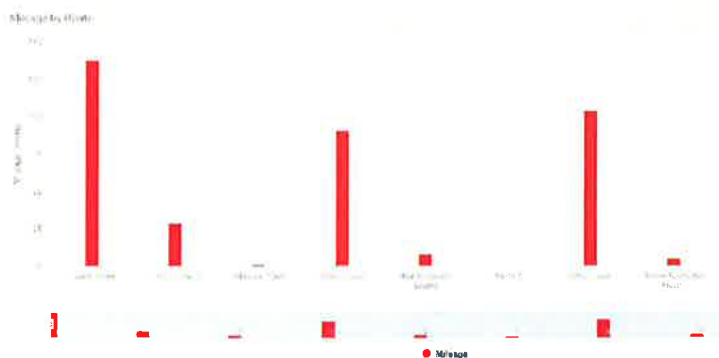
Mileage By Route Report

Date range: Start Date: 2018/11/02
End Date: 2018/11/17

Category: ☐ All ☒ Mileage

View only (filter on): ☐ All ☐ Mileage

[RETRIEVE DATA](#) [DOWNLOAD CSV](#)



Route ID	Route Name	2018/11/02	2018/11/03	2018/11/04	2018/11/05	2018/11/06	2018/11/07	2018/11/08	2018/11/09	2018/11/10	2018/11/11	2018/11/12	2018/11/13	2018/11/14	2018/11/15	2018/11/16	2018/11/17	2018/11/18	2018/11/19	2018/11/20	2018/11/21	1
101	Orange Blvd	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
102	Orange Blvd P	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
103	Orange Blvd	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
104	Orange Blvd S	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
105	Orange Blvd	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
106	Orange Blvd	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
107	Orange Blvd	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
108	Orange Blvd	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Example Report

Speeding Report

Minimum Speed (mph)

45

Date

2018-07-02

RETRIEVE DATA

DOWNLOAD CSV

Speeding Data

Date	Speed	Route Name	Route id	Bus Name	View
2018-07-02 ...	46	3 Highland V...	2245	1574	View
2018-07-02 ...	46	1 S.Walnut/C...	2234	0866	View
2018-07-02 ...	50	9 IU Campus...	2271	1780	View
2018-07-02 ...	51	6 Campus S...	2257	1777	View
2018-07-02 ...	57	6 Campus S...	2257	1777	View
2018-07-02 ...	48	6 Campus S...	2257	1777	View

Speeding Report sample data

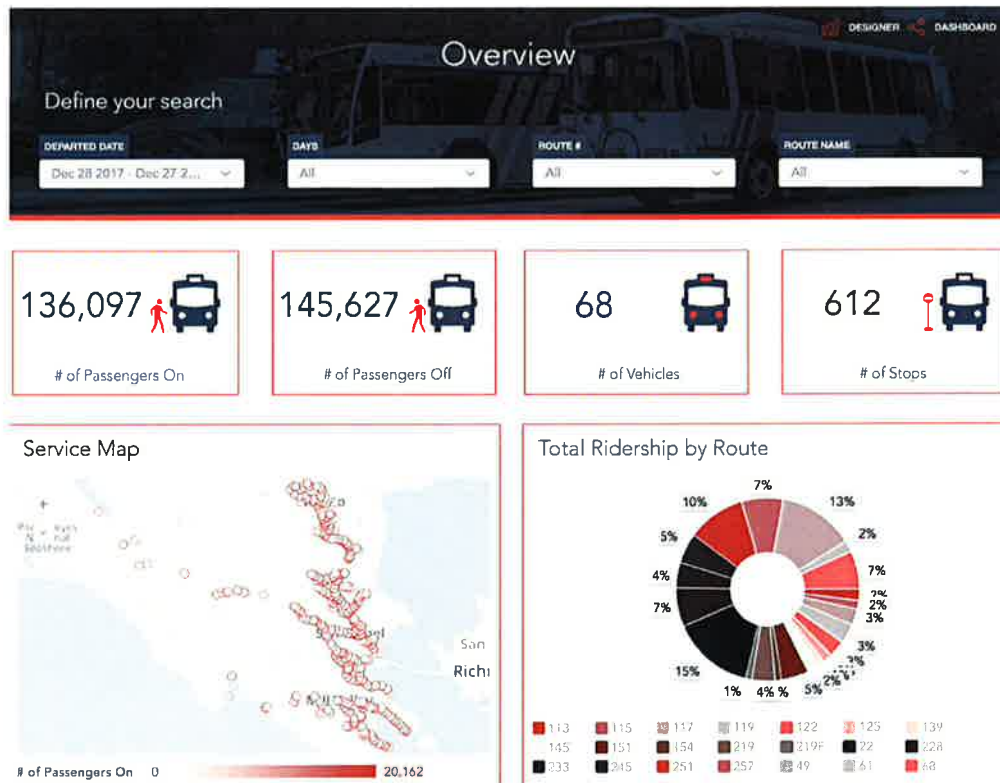
Business Intelligence

DoubleMap's ability to offer this platform is invaluable as the business analytic platform takes the same powerful analytics traditionally confined to data experts and delivers them to transit clients like you.

Why is this platform amazing? It allows administrators and dispatchers to directly answer key problems and questions (e.g. why did our on-time performance change dramatically?). It allows the client to be notified when things go off-track (e.g. monitoring the activity of all the vehicles/drivers to continuously make their services better). It will allow the administrators and dispatchers to understand what's going on all day, everyday. They can use data to support operation decisions and fix problems in real-time. They can track day-to-day activity as they view/manage the buses on the map. The platform with further help the client mitigate risks and comply with security directives (data permissions, user management, etc).

The data collected, the reports built, and information analyzed is at your fingertips to be able to view, investigate, and build for multiple aspects of the service.

Administrators will be able to see an overview of their service broken down into sections which are most important to them: number of passengers boarding and alighting, number of system vehicles, and number of stops. An overview of the service map will be visible, as well as charts to highlight key areas.



Administrators can define their search by using the filters located along the top in order to pull up ridership information for specific days and routes.

OVERVIEW

DESIGNER

DASHBOARD

Stops

Define your search

DEPARTED DATE

DAYS

ROUTE #

ROUTE NAME

Dec 28 2017 - Dec 27 2...

All

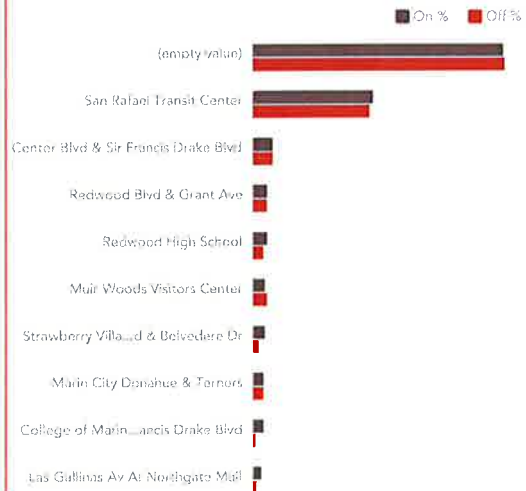
All

All

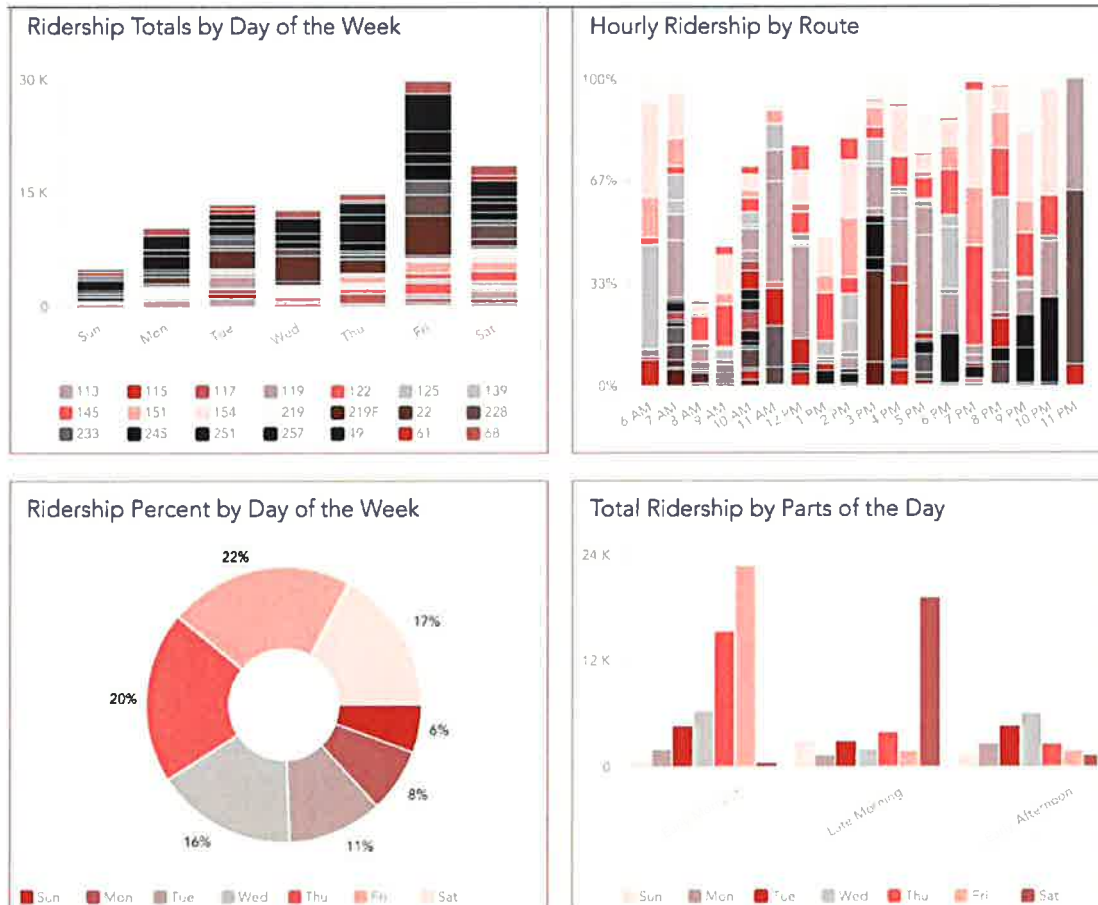
Stop Ridership Breakdown

Stop Name	Avg On	Avg Off	Total On	% On	Total Off	% Off
(empty value)	0,5	0,6	41,872	31%	45,211	31%
1111 Sir Francis Drak	0,1	0,0	159	0%	44	0%
1125 Sir Francis Drak	0,0	0,2	50	0%	194	0%
1137 Idylberry Rd	0,0	0,0	0	0%	0	0%
1204 Idylberry Rd	0,9	0,0	18	0%	0	0%
120 Mount Lassen Ct	0,0	0,0	0	0%	0	0%
1220 S Eliseo Dr	0,0	0,2	17	0%	97	0%
14682 Sir Francis Dra	0,2	0,2	142	0%	139	0%
203 Smith Ranch Rd-C	0,0	0,2	12	0%	109	0%
204 Smith Ranch Rd	0,2	0,0	46	0%	8	0%
3194 Lucas Valley Rd	0,0	0,0	0	0%	0	0%
33 San Clemente Dr	1,2	1,7	181	0%	273	0%
4810 Shoreline Hwy	1,9	0,2	208	0%	21	0%
4813 Shoreline Hwy	0,2	1,1	22	0%	144	0%
600 Larkspur Landing	0,2	0,1	298	0%	168	0%
630 S Eliseo Dr	0,1	0,1	33	0%	72	0%
6402 Shoreline Hwy	0,0	0,0	2	0%	1	0%

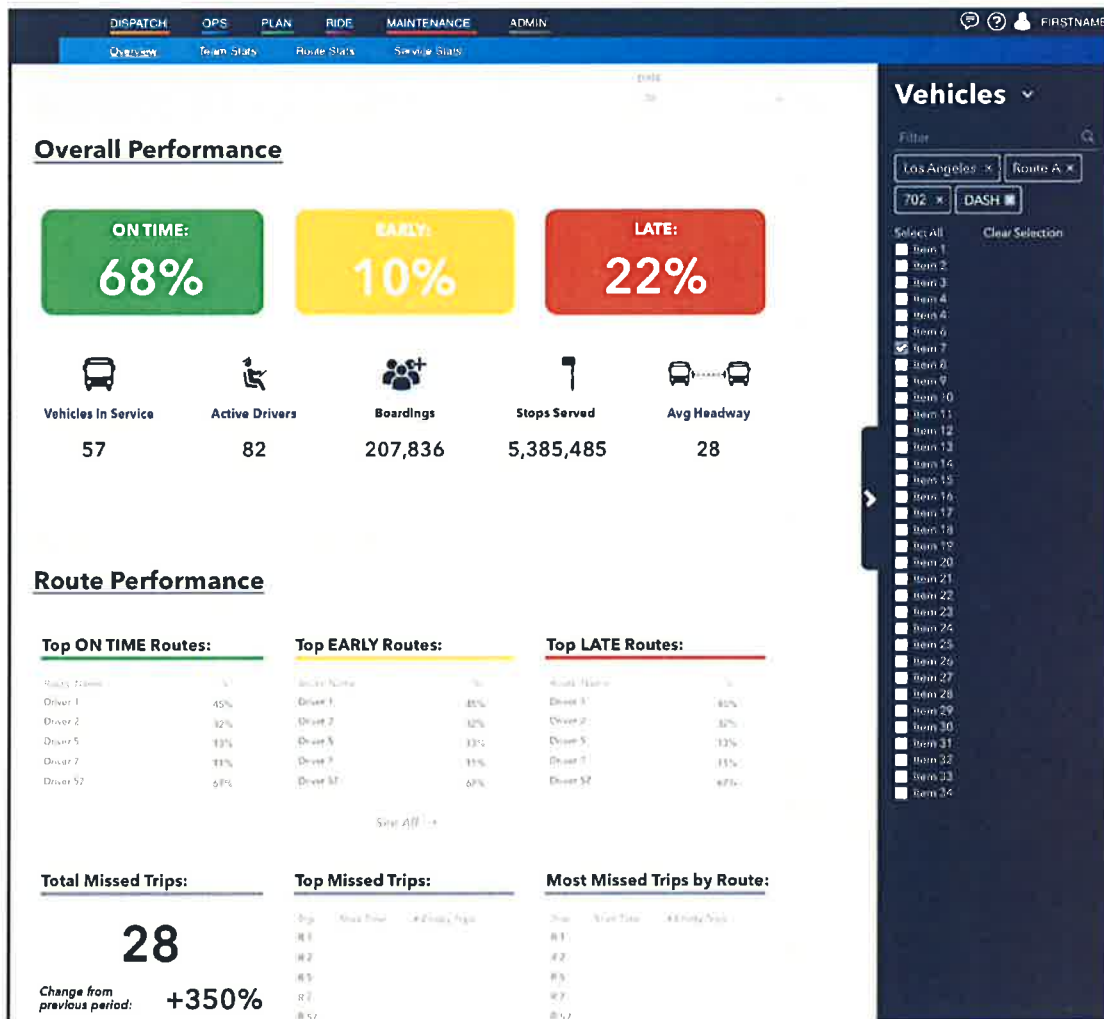
Ridership Percentages by Stop

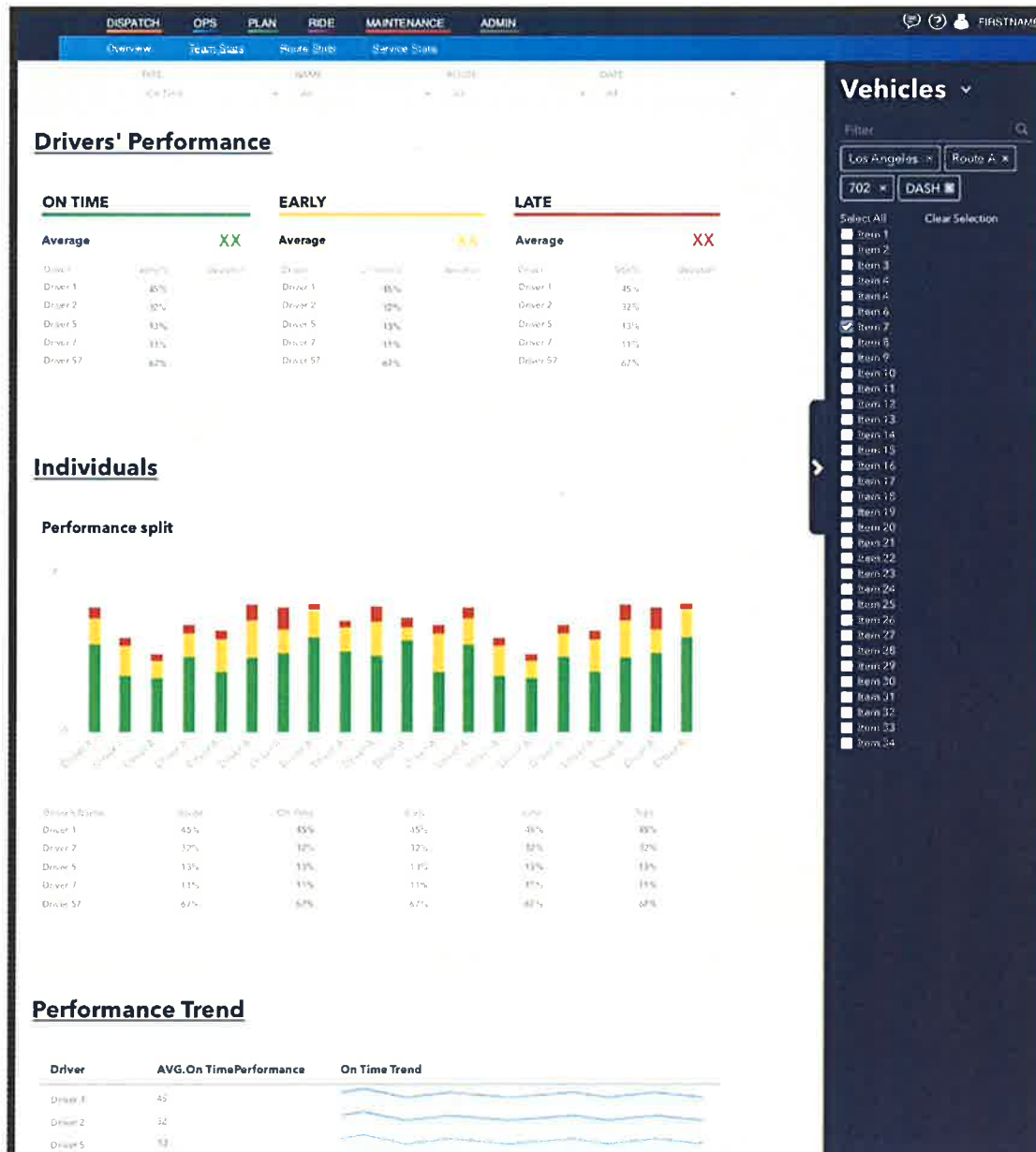


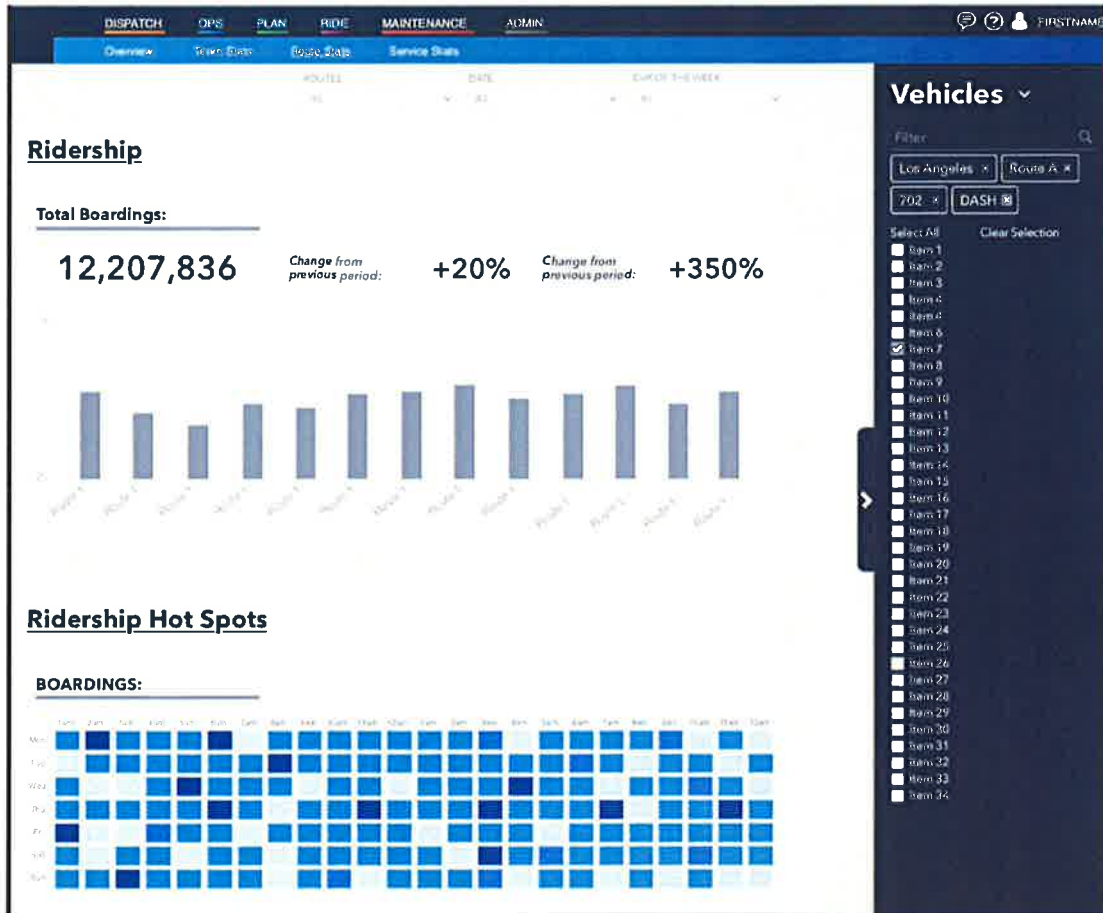
Administrators can information via an array of charts and graphs in order to view information by definable filters such as day of the week, hours, and parts of the day.



Administrators are further able to view reporting including, but not limited to, Route Performance, Drivers' Performance, Individuals' Performance, Performance Trend, Ridership statistics, Ridership hotspots, and more.











FEDERAL TRANSIT ADMINISTRATION (FTA) DRUG & ALCOHOL POLICY



Federal Transit
Administration

EFFECTIVE DATE:

August 1, 2001

REVISION DATES:

June 1, 2008

Merged policies from Legacy FirstGroup America and Legacy Laidlaw Transit Services

September 1, 2008

Added revisions to 49 CFR Part 40 which became effective August 25, 2008

February 1, 2009

Policy updated per 49 CFR Part 40 and 49 CFR Part 655

August 31, 2009

Policy updated per 49 CFR Part 40 and 49 CFR Part 655

January 10, 2011

Policy updated per 49 CFR Part 40 and 49 CFR Part 655

March 3, 2011

Policy updated per 49 CFR Part 40 and 49 CFR Part 655

September 25, 2014

Policy updated per 49 CFR Part 40 and 49 CFR Part 655

January 1, 2018

Policy updated per 49 CFR Part 40 and 49 CFR Part 655

This document sets forth FirstGroup America's policy on alcohol misuse and controlled substance abuse and details FirstGroup America's substance abuse testing program which applies to all FirstGroup America's employees who work at the Company's FTA regulated locations.

This policy is based on the DOT requirements set forth in the DOT regulation 49 CFR Part 40 and FTA 49 CFR Part 655. The Federal Regulations are available upon request.

Requirements and/or disciplinary actions established by FirstGroup America are entered in **bold-faced type**; otherwise, the FTA mandates the requirements and/or actions contained in this policy.

On August 1, 2001 the governing board approved this policy. Subsequent revisions and board approval dates are noted above.

A handwritten signature in black ink, appearing to read "Brad Thomas".

Brad Thomas
President

A Zero Tolerance Company

FirstGroup America supports a policy of a drug-free workforce. To implement the policy, FirstGroup America has instituted a program of drug abuse education for employees, drug and alcohol testing for **all** employees and applicants for employment, a statement of prohibited behavior(s), corrective action related to positive tests or a refusal to test, and resources for employee assistance and rehabilitation.

The Company recognizes that its employees' use of illegal drugs and misuse of alcohol pose a significant risk to public safety, as well as the employee's health and well being. Drug use includes, but is not limited to, marijuana, amphetamines, phencyclidine, cocaine and opioids, as well as any substance which causes the presence of these drugs or drug metabolites such as hemp-related products, coca leaves or any substance not approved for medical use by the U.S. Food and Drug Administration. Illegal use includes use of any illegal drug, misuse of legally prescribed drugs, and use of illegally obtained prescription drugs. The "use" of drugs means presence in an employee's body system while on duty. FirstGroup America and all operating

Companies cooperate fully with local, state, and federal authorities in matters pertaining to the use, possession, or sale of controlled substances by anyone on Company premises.

A. PURPOSE

The purpose of this policy is to assure worker fitness for duty and to protect FirstGroup America employees, customers, and the public from the safety and health risks posed by the misuse of alcohol and use of prohibited drugs. This policy is intended to comply with all applicable federal, state and local legislation and regulations governing workplace anti-drug use and alcohol misuse. They include DOT 49 CFR Part 40; FTA 49 CFR Part 655; as well as Company zero tolerance policy. This policy incorporates the requirements of the above regulations for safety-sensitive and **non-safety sensitive** employees.

Reporting to work in an impaired or unfit condition because of the use or consumption of controlled substances or alcohol is strictly prohibited. Any employee who uses, possesses, or is involved in the sale or purchase of any prohibited drugs, while on Company premises, conducting Company business or operating Company equipment is considered to be in violation of Company policy.

If any conflict occurs between state and local laws and any requirement of the above-mentioned Federal regulations, the Federal regulations prevail. However, Federal regulations do not pre-empt provisions of State criminal laws that impose sanctions for reckless conduct attributed to prohibited drug use or alcohol misuse, whether the provisions apply specifically to transportation employees, employers, or the public in general.

B. EDUCATION AND TRAINING

The education and ongoing awareness component of this policy will include display of posters, distribution to all covered employees and representatives of employee organizations of the drug and alcohol policy and other informational materials, and periodic information seminars. Each employee will be required to sign an acknowledgment form.

As required by FTA regulations, the Company will provide a minimum of 60 minutes of training on the effects and consequences of prohibited drug use on personal health, safety, and the work environment, and on the signs and symptoms that may indicate prohibited drug use.

All supervisory personnel or Company officials who are in a position to determine employee fitness for duty will receive an initial 60 minutes of reasonable suspicion training on the physical, behavioral, and performance indicators of probable drug use and 60 minutes of additional reasonable suspicion training on the physical, behavioral, speech, and performance indicators of probable alcohol misuse. Periodic retraining will also be required of supervisory personnel.

C. COVERED EMPLOYEES

General

As a condition of employment, **all** employees are required to submit to drug and alcohol testing as allowed by law. Those of Safety Sensitive positions (refer to Appendix A) shall be in accordance with 49 CFR Part 655. A refusal to submit to a test as directed will be considered a refusal and the employee **will be disciplined up to and including termination**.

Safety-Sensitive

As defined by the FTA, safety-sensitive employees include those who perform, or may be called upon to perform, the following safety-sensitive functions:

1. Operating a revenue service vehicle, even when the vehicle is not in revenue service;
2. Operating a non-revenue service vehicle when required to be operated by a Commercial Driver's License (CDL) holder;
3. Controlling dispatch or movement of a revenue service vehicle;
4. Maintaining (including repairs, overhaul and rebuilding) a revenue service vehicle or equipment used in revenue service; and
5. Carrying a firearm for security purposes.

D. PRESCRIPTION OR OVER-THE-COUNTER MEDICATION

Please note there are risks associated with the use of certain prescription and over the counter medications.

Under Company policy, the use of legally prescribed drugs and over the counter medications is not prohibited. However, before beginning a work shift, Company employees must report to his or her supervisor the use of substances that may potentially impair performance or increase the probability of accident, injury, or damage to property. It is the employee's responsibility to advise their supervisor of over the counter medication and/or prescription medications taken. It is also the employee's responsibility to obtain and provide documentation to the employee's supervisor from a certified medical professional confirming the employee's fitness to safely perform his/her job responsibilities.

A verified positive drug test result whether for illegal substances, illegal use of prescriptions, or misuse of prescriptions will result in disciplinary action up to and including termination. A prescription is considered valid only if it is in writing and indicates the employee's name, date, the name of the substance, quantity or amount to be taken, and the period of authorization. It is a violation of this policy to use any controlled substance in a manner that is inconsistent with the prescription.

E. TYPES OF TESTING

Safety Sensitive Employees

Pre-Employment Testing

A verified negative drug test result must be received before any applicant shall be permitted to perform any safety sensitive job function. A pre-employment drug test must also be performed and a negative result received for an employee who transfers from a non-safety sensitive position to a safety sensitive position prior to the employee assuming his or her new position.

If the applicant previously worked for any DOT-covered employer in the past two years, FirstGroup America also will conduct a pre-employment drug and alcohol background check from the previous employers. The Company will also inquire in writing if the applicant has previously failed or refused a DOT drug or alcohol test in the previous two years. If there was any previous violation, the employee must provide the Company proof of having successfully completed a SAP-recommended referral, evaluation and treatment plan.

If a pre-employment test is canceled by the MRO, the individual will be required to undergo another test and successfully pass the test with a verified negative result before performing safety-sensitive duties. If an

applicant tests positive for drug(s), or alcohol at .04 or above, or refuses to submit to a test when required, the Company shall advise the individual of the resources available for evaluating and resolving problems associated with prohibited drug use and alcohol misuse and document such referral. He or she shall be given the name, address and phone number of a local Substance Abuse Professional (SAP).

When a covered employee or applicant has not performed a safety sensitive function or an employee's employment status has changed, (temporary layoff, leave of absence, lost time Worker's Compensation claim, etc) for 90 or more consecutive calendar days regardless of the reason, and the employee has not been in the employer's random selection pool during that time, the Company shall ensure that the employee takes a pre-employment drug test with a verified negative result prior to resuming safety-sensitive functions.

In cases of temporary leave, less than 30 days (such as vacation, sick leave, jury duty, etc.) when the employee has not been taken out of the random pool, a DOT pre-employment test is not required prior to returning to a safety sensitive position.

If the temporary leave extends beyond 30 days but less than 90 days, the employee must have a non-DOT pre-employment test with a verified negative result prior to resuming safety-sensitive functions under Company policy.

For those employees who are in a non-safety-sensitive position and are not covered by federal regulations, they will be required, prior to returning to work, to have a non-DOT pre-employment drug test with a negative test result. This drug test will be conducted only after employee has been out on leave for more than 30 days.

Note: The Return-to-Duty testing category should not be used under these testing circumstances. The pre-employment category is to be used.

NOTE: The Company may conduct pre-employment alcohol testing where mandated by contract.

Reasonable Suspicion Testing

The Company shall conduct a drug and/or alcohol test when the Company has reasonable suspicion to believe that the covered employee has used a prohibited drug and/or engaged in alcohol misuse.

- The Company's determination that reasonable suspicion exists shall be based on specific, contemporaneous, articulable observations concerning the appearance, behavior, speech, or body odors of the covered employee. A supervisor or other company official (s) who is trained in detecting the signs and symptoms of drug use and alcohol misuse must make the required observations.
- Alcohol testing is authorized under this section only if the observations required by the above paragraph of this section are made during, just preceding, or just after the period of the workday that the covered employee is required to be in compliance with this part. The Company shall direct a covered employee to undergo reasonable suspicion testing for alcohol only while employee is performing safety-sensitive functions; just before the employee is to perform safety-sensitive functions; or just after the employee has ceased performing such functions.
- If an alcohol test required by this section is not administered within two hours following the determination under this section, the employer shall prepare and maintain on file a record stating the reasons the alcohol test was not promptly administered. If an alcohol test required by this section is not administered within eight hours following the determination of this section, the employer shall cease attempts to administer an alcohol test and state in the record the reasons for not administering the test.

All Company employees are subject to reasonable suspicion testing for drugs and/or alcohol. Whenever a trained supervisor or other Company official has reason to believe that an employee has misused alcohol or a prohibited drug, reasonable suspicion testing will be conducted. The identifying supervisor's observations will be documented and such documentation shall be kept in the employee's confidential drug and alcohol testing file. Employees directed to submit to reasonable suspicion testing shall be escorted by a

supervisor who will drive the employee to the collection site. The employee shall not be permitted to return to duty until a negative test has been confirmed. An employee who produces a negative result shall be promptly returned to his or her regular work and be made whole for any lost wages. The Company will only direct a covered employee to undergo reasonable suspicion alcohol testing while the employee is performing, is just about to perform, or has just ceased performing safety-sensitive functions.

Post-Accident Testing

Any safety-sensitive employee involved in an accident shall be required to submit to drug and alcohol test(s) as soon as practicable after the accident.

Thresholds for FTA Post Accident testing:

- Fatality. In the event of a fatality, any surviving covered employee operating a public transportation vehicle at the time of an accident will be required to submit to tests for alcohol and prohibited drugs as soon as practicable. The company also will test any other employee whose performance could have contributed to the accident, as determined by the company using the best information available at the time of the decision.
- Bodily injury to a person who, as a result of the injury, immediately receives medical treatment away from the scene of the accident; or
- One or more motor vehicles incurring disabling damage as a result of the accident, requiring the motor vehicle(s) to be transported away from the scene by a tow truck or other motor vehicle.

In the event of a non-fatal accident that otherwise meets the FTA post-accident testing threshold, the decision to administer or not administer a post-accident test shall be based on FirstGroup America's determination of whether or not the covered employee was a contributing factor to the accident, using the best information available at the time of the accident. The company also will test any other employee whose performance could have contributed to the accident, as determined by the company using the best information available at the time of the decision. At FirstGroup America, for all accidents, we use the Post Accident Substance Abuse Testing Decision Maker to make our decision to test or not to test and document the file.

Covered employees are prohibited from using alcohol for eight hours following any accident or until the required post-accident test is administered, whichever comes first. Every effort will be made to conduct post-accident drug and alcohol tests within two hours following an accident. Covered employees involved in accidents must remain readily available for testing, including notifying the Company of their location if they leave the scene of the accident before testing, and will be considered to have refused to submit to testing if they fail to do so. This requirement will not require the delay of necessary medical attention for injured people following an accident or prohibit a covered employee from leaving the scene of an accident for the period necessary to obtain assistance in responding to the accident or obtain necessary emergency medical care.

In the event an alcohol test is not administered within two hours following an accident, the Company will prepare and maintain a record stating the reasons why the test was not promptly administered. If an alcohol test is not administered within eight hours following an accident, the Company will make no further effort to administer an alcohol test and document the reasons why the test was not administered within eight hours. In the event a drug test is not administered within 32 hours following an accident, the Company will cease its attempts to administer any further testing and document the reasons why the test was not performed.

FirstGroup America's policy is such that following a post-accident test; the employee is not allowed to perform any safety-sensitive function until the Company has received negative test results. So long as they are not subject to any disciplinary action related to the accident, any employee whose drug test and/or alcohol test produces a negative result shall be promptly returned to his or her regular work and be made whole for any lost wages, unless the employee is suspended for any additional purposes concurrent with the waiting of the test results.

Random Drug and Alcohol Testing

The Company will conduct random drug and alcohol tests at a minimum annual percentage of covered employees as required by the FTA. The random testing rates are subject to change on an annual basis, depending on the industry-wide positive rate determined by the FTA from the annual MIS reports submitted by covered employers. Management does not have discretion and/or influence concerning the selection process.

The random selection process will be completely objective and anonymous and will utilize a scientifically valid method such as a random number table or a computer based random number generator matched with employee's social security numbers, payroll identification numbers, or other comparable identifying numbers. This method ensures each employee the same fair and equal chance of selection for testing. A covered employee may be randomly tested for prohibited drug use anytime while on duty. The testing will be unannounced and unpredictable. The Company will ensure that testing will be reasonably spread throughout the course of the year, all days of the week and hours of the day when safety-sensitive duties are being performed.

Random lists are only valid for the month indicated on the list and expire on the last day of each month. No employee can be tested after the random selection period has expired. Therefore, the DER must make every effort to test all employees selected during the month in which they are selected. If an employee is unavailable for testing due to an approved leave (i.e. vacation, leave of absence, illness) the DER must test that employee when they return as long as it is within the random selection period. All employees selected for random testing are required to be tested during the random selection period. For missed tests, a legitimate reason must be documented and kept on file with the random selection list.

Employees are required to immediately proceed to the designated collection site testing facility following notification of selection.

Covered employees will only be required to submit to random alcohol tests if they are performing a safety-sensitive function, about to perform a safety-sensitive function, or have just ceased performing a safety-sensitive function.

Failure to submit to a test, failure to comply with the instructions of the testing facility staff or leaving the facility prior to the completion of the test shall be treated as a "refusal-to-test", which is treated as a failed test.

Failure to submit to or complete the test as outlined above will subject the employee to immediate suspension and disciplinary action up to and including termination.

Return-To-Duty/Follow-Up Testing

FirstGroup America is zero tolerance employer, and therefore does not conduct Return-To-Duty or Follow-up testing.

Non-Safety Sensitive Employees

Employees in non-safety sensitive positions are subject to the Company's drug and alcohol testing program pursuant to an applicable Collective Bargaining Agreement or State law. The same guidelines for testing under DOT/safety sensitive will be used for a non-safety sensitive test, only using non-federal forms.

Refusal to Submit/Test

Any covered employee who refuses to submit to an alcohol and/or drug test will be prohibited from performing or continuing to perform a safety-sensitive function and be subject to discipline. "Refusal to Submit" to an alcohol and/or drug test carries the same consequences as a positive test result, a violation of this policy, and includes the following conduct:

- Failure to appear for any test (except a pre-employment) at the collection site in the time allotted.
- Failure to remain at the test site until the testing process is completed, except in pre-employment situations where leaving before the testing process begins is not deemed to be a test refusal.
- Failure to attempt to provide a breath or urine specimen.
- Failure to provide a urine, breath, or saliva specimen collection when it is required by DOT Part 40.

- Failure to permit the observation or monitoring or specimen collection when it is required.
- Failure to provide a sufficient amount of urine or breath specimen without a valid medical explanation.
- Failing to cooperate with any part of the testing process (e.g. refusing to empty pockets when so directed by the collector or behaving in a confrontational way that disrupts the collection process).
- For an observed collection, failure to follow the observer's instructions to raise clothing above the waist, lower clothing and underpants, and to turn around to permit the observer to determine if individual is wearing any type of prosthetic device that could be used to interfere with the collection process.
- Failure or refusal to take a second test FirstGroup America, the MRO, or collector has directed the employee to take.
- Possessing or wearing a prosthetic or other device that could be used to interfere with the collection process.
- Admitting adulteration or substitution of the specimen to the collector or the MRO.
- Failure to sign the certification at Step 2 of the ATF (Alcohol Testing Form).
- If the MRO reports a verified adulterated or substituted test result.
- Failure to undergo a medical evaluation when required by the MRO or DER.
- Leaving the scene of the accident without just cause prior to submitting to post-accident test.

F. DRUG & ALCOHOL TESTING PROCEDURES

General

FirstGroup America will conduct all DOT drug and alcohol testing in accordance with 49 CFR Part 40, as amended.

To test for prohibited drugs, an initial screening test using an immunoassay technique will be performed at a DHHS certified laboratory. If the specimen is positive, a DOT authorized confirmatory test will be performed. If the test is confirmed positive, the Medical Review Officer (MRO) will conduct a verification process, which includes giving the employee an opportunity to provide a valid medical explanation for the positive test result.

The Company will require the employee to immediately provide another specimen collection under direct observation if the creatinine concentration of a negative-dilute specimen was greater than or equal to 2mg/dL but less than or equal to 5mg/dL. If the result of the second test is again negative-dilute, the Company will accept the result as negative.

If the laboratory reports to the MRO an "Invalid Result" or "Rejected for Testing" (because of a fatal or uncorrectable flaw), a recollection may be required by the MRO, and depending on the circumstances, the recollection may be directly observed. Urine is collected at a DOT approved collection site and is sent to a DHHS certified laboratory for testing. The employee must produce at least 45 mL of urine or will be considered to have a "shy bladder". If the employee cannot produce the required quantity of urine ("shy bladder"), the collection site will offer employee the opportunity to consume up to 40oz. of water within a three (3) hour time frame in order to produce the required 45mL of urine. The employee may NOT exit the premises of the testing facility during this time. If employee leaves the testing facility, the test will be considered a refusal subjecting the employee to **immediate suspension and disciplinary action up to and including termination.**

In the event of a "shy bladder," **employee will be placed on administrative leave** and must undergo a medical evaluation. The Company will refer the employee to a physician acceptable to the MRO and employee will be required to provide evidence of a medical condition hindering the production of urine. The employee has 5 days to get a medical evaluation once a shy bladder occurs. **If the medical evaluation proves that there is a valid medical condition, the employee shall be reimbursed and returned to duty with full pay or placed back into the recruiting process**

To test for alcohol, the employee shall be required to provide a breath sample using an Evidential Breath Testing (EBT) device on the NHTSA conforming products list and operated by a trained Breath Alcohol Technician (BAT). If the initial test result is 0.02 or higher, the employee will be directed to take a confirmation test. In the event of a "shy lung", where the employee is unable to provide a sufficient breath sample for testing, the Company will refer the employee to a physician of our choice for medical

examination within 5 days to determine if there is a valid medical condition that makes it unable for the employee to provide a sufficient amount of breath.

If the physician finds:

1. That a medical condition has, or with a high degree of probability could have, precluded the employee from providing a sufficient amount of breath, the test is cancelled. Each time an employee of the Company is selected for testing, they must make a valid attempt to provide a breath sample. All previous testing scenarios do not apply and any previous letters that have been kept on file regarding a medical condition are no longer valid.

2. That there is not an adequate basis for determining that a medical condition has, or with a high degree of probability could have, precluded the employee from providing a sufficient amount of breath, the employee will be considered to have refused the test.

Dilute Results

If there is a dilute test result, unless the creatinine concentration of a negative-dilute specimen was greater than or equal to 2mg/dL but less than or equal to 5mg/dL, **the Company will accept the test result and there will be no re-test.**

Prohibited Substances

The following uses unless legally prescribed, consumption of these substances is prohibited at all times. Covered employees may be tested for drugs any time they are on duty. Off duty use may result in an on duty positive.

In accordance with US DOT 49 CFR Parts 655 and 40, the following are prohibited substances:

- Cocaine
- Phencyclidine (PCP)
- Cannabinoids (Marijuana)
- Amphetamines (includes methamphetamine and MDMA- Ecstasy)
- Semi-synthetic opioids (hydrocodone, oxycodone, hydromorphone, oxymorphone)
- Alcohol Misuse as defined in Prohibited Usage of Alcohol, below.

Medical Marijuana

In accordance with US DOT 49 CFR Parts 655 and Part 40, state laws legalizing marijuana for medicinal purposes will not constitute a valid medical explanation for an employee's positive drug test result. Marijuana remains a Schedule I drug and the use of marijuana by safety sensitive employees is prohibited.

Alcohol Testing

The Company will be testing for alcohol in the following circumstances:

- Post Accident
- Reasonable Suspicion
- Random

Prohibited Usage of Alcohol

The following uses of alcohol are prohibited under this policy:

1. Reporting for duty or remaining on duty requiring the performance of safety-sensitive functions while having an alcohol concentration of 0.02 or greater.
2. Using alcohol while performing safety-sensitive functions.
3. Using alcohol within four hours prior to performing a safety-sensitive function.
4. Employees are prohibited from using alcohol during their specified on-call hours. However, any on-call employee who has used alcohol during his/her on call hours will be given the opportunity to acknowledge such use and/or their inability to perform a safety-sensitive function at the time they are called to report to duty. If an on-call employee acknowledges the use of alcohol, but claims to be able to perform their safety-sensitive function, they will be required to submit to an alcohol test.
5. Eight hours following an accident, or until after the test is completed.

Directly Observed Urine Specimen Collection

Under DOTs 49 CFR Part 40 directly observed collections are permissible only under one of the following circumstances:

- Creatinine between 2 mg/dL but less than or equal to 5 mg/dL as verified by the MRO;
- If the collector observes employee conduct that clearly indicates an attempt to tamper with a specimen;
- If the temperature on the original specimen was out of range;
- If the original specimen appeared to have been tampered with;
- If the laboratory reported to the MRO that a specimen is invalid and there was no adequate medical explanation for the result;
- If the MRO reported that the original positive, adulterated, or substituted test result had to be canceled because the split specimen testing could not be performed;
- The test is a follow-up test or a return to duty test.

The observer shall be the same gender as the employee, but need not be the collector. The observer is responsible for ensuring that the specimen goes from the employee's body into the collection container. If the employee declines to allow a directly observed collection when required or permitted under this policy, it is considered a refusal to test.

Split Specimen Testing

After notification by the MRO of a verified positive drug test or refusal to test because of adulteration or substitution, the employee has 72 hours to request a test of the split specimen; DOT does not authorize split specimen testing if the test result is invalid. If more than 72 hours have passed, but the employee can present information that demonstrates to the satisfaction of the MRO that extenuating circumstances unavoidably prevented the employee from making a timely request, the split specimen may be tested. **The employee will be suspended without pay or removed from the hiring process until the result of the split sample test is received from the MRO. Should the result of the second test be positive, the employee shall be required to reimburse the Company for the cost of the test. The employee shall be returned to duty with full pay if the second test invalidates the original test or if the test was cancelled.**

G. CONSEQUENCES/DISCIPLINE

In addition to the immediate removal from safety-sensitive functions required by Federal Transit Administration Regulations, the Company will take the following disciplinary action against any individual who violates this policy:

- A) An individual who tests positive on a pre-employment or pre-duty test for a prohibited drug will not be hired for a covered function position. A referral to an SAP will be provided.
- B) Any covered employee who has a verified positive drug or confirmed alcohol test result with an alcohol concentration of 0.04 or greater, or who refuses to submit to a drug or alcohol test under this part, will be removed immediately from his or her safety-sensitive function and be evaluated by a Substance Abuse Professional. **The consequences of verified positive drug or confirmed alcohol test the employee is subject to disciplinary action up to and including termination under Company policy**
- C) **If an employee's alcohol test result is 0.02 or above, but less than 0.04, the employee will be removed from safety-sensitive functions and the employee will be subject to the consequences of disciplinary action up to and including termination under Company policy (unless prohibited by Collective Bargaining Agreement).**

H. REFERRAL, EVALUATION AND TREATMENT

If an employee or applicant tests positive for drug(s) or alcohol or refuses to submit to a test when required, the Company shall refer the employee to a local Substance Abuse Professional (SAP), advise the individual of the resources available for evaluating and resolving problems associated with prohibited drug use and alcohol misuse, and document such referral. He or she shall be given the name, address and phone number of Substance Abuse Professional (SAP) acceptable to the Company and a list of community hot line numbers if available.

The employee will be responsible for any and all costs associated with the SAP evaluation and recommendation(s), unless otherwise required by applicable federal or state law.

Voluntary Self-Referral

An employee who voluntarily (not in response to a Company request to take a drug or alcohol test, or the positive result of a drug or alcohol test) admits to management that he or she has a substance abuse or alcohol problem, and who wishes to voluntarily submit to a Rehabilitation Program, shall be placed on unpaid medical leave. Any voluntary requests for treatment must be made prior to any pending drug/alcohol test or disciplinary related action.

- **An appropriate leave of absence may be granted for treatment and rehabilitation.**
- **The employee may be permitted to take accrued sick leave or administrative leave to participate in the Substance Abuse Counselor prescribed treatment program. If the employee has insufficient accrued leave, the employee shall be placed on leave without pay until the Substance Abuse Counselor has determined that the employee has successfully completed the required treatment program and releases him/her to return to safety sensitive duties.**
- **Any leave taken, either paid or unpaid, shall be considered leave taken under the Family and Medical Leave Act.**
- **Payment for treatment will be coordinated through the employee's health insurance provider. Employees who do not have health insurance coverage are responsible for the entire cost of any recommended treatment or rehabilitation services.**
- **The employee must present evidence of having enrolled in and successfully completed, at his or her own expense, a rehabilitation program approved by FirstGroup America.**
- **The employee must submit to a non-DOT pre-employment drug and alcohol test, at his or her own expense, which produces a negative result.**
- **The employee must sign FirstGroup America's Post-Rehabilitation Return to Work Agreement.**
- **If a test result is canceled by the lab, the individual will be required to undergo another test and successfully pass the test with a verified negative result before performing safety-sensitive duties.**

An employee placed on unpaid leave as provided in this section must satisfy the provisions of the items above not later than 12 weeks from the commencement of this leave. An employee failing to do so shall be deemed to have abandoned his or her job. Any employee who is returned to work as provided in this section of the policy and who fails to comply with any of the terms of the Post – Rehabilitation Return to Work Agreement will be discharged. Employees will not be disciplined for requesting treatment, but will be expected to observe job performance standards and work rules as they apply to every employee. Any decision to seek help will not interfere with an employee's eligibility for promotional opportunities. Confidentiality of information will be maintained at all times.

APPENDIX A - Safety-Sensitive Job Functions/Descriptions

The following positions have been designated as safety-sensitive functions and shall be subject to testing under the requirements of the policy.

All Drivers of Company Vehicles - Any employee who operates a revenue service vehicle, even when not in revenue service, which includes driving on company property and behind-the-wheel training. Any employee who operates a non-revenue service vehicle, when required to be operated by a holder of a Commercial Drivers License (CDL).

Vehicle Maintenance Workers - Those employees that maintain a revenue vehicle or equipment used in revenue service.

Employees Holding A CDL - Any employee who holds a CDL, and is subject to revenue vehicle operation, may operate a non-revenue vehicle when required to be operated by a holder of a CDL, and / or perform vehicle maintenance on equipment used in revenue service.

Dispatchers / General Managers / Supervisors - Employees who control the dispatch or movement of revenue service vehicles including all executive staff during a crisis situation. Supervisors who may have job descriptions that include safety-sensitive functions will be subject to the requirements of the policy while they are performing the safety-sensitive duty. This includes General Managers, Operations Managers, Assistant Operations Managers, Maintenance Managers, and Managers.

Senior Staff Positions - President, Senior Vice President, Region Vice President, Director of Safety, Region Manager, Assistant Manager, and General Manager. This includes all senior staff positions that have the ability to control the movement of revenue service vehicles (dispatch) in a crisis situation.

Clerk / Receptionist / Dispatchers - Those employees that work as clerks or receptionists in the Location who will occasionally control the dispatch or movement of a revenue vehicle.

NOTE:

- In addition to the above, all FirstGroup America positions are subject to review for safety-sensitive qualifications and may be added to the random testing protocol at any time.
- If you have a location specific job function that is not included in the above, please contact the Drug and Alcohol Program Manager (DAPM) to clarify the job duties regarding safety-sensitive or non-safety-sensitive testing.

APPENDIX B - To Find a Local DOT-qualified Substance Abuse Professional (SAP) in Your Area

SAPlist.com - www.saplist.com

Primary goal: to help employers find, contract and engage the services of qualified and trained SAPs.

National Counseling Resource – (800) 607-1010

- Managed SAP Services
- Works with qualified DOT SAPs nationwide
- Employer/Employee contacts provider and contracts through them for SAP services for a flat fee
- Oversees process and reports to make sure compliant

National Substance Abuse Professionals – www.nsapn.com (800) 879-6428

- Managed SAP Services
- Works with qualified DOT SAPs nationwide
- Employer/Employee contacts provider and contracts through them for SAP services for a flat fee
- Oversees process and reports to make sure compliant

American Substance Abuse Professionals (ASAP) – www.go2asap.com (888) 792-2727

- Managed SAP Services
- Works with qualified DOT SAPs nationwide
- Employer/Employee contacts provider and contracts through them for SAP services for a flat fee
- Oversees process and reports to make sure compliant

**Drug and Alcohol Policy
Employee Acknowledgement Form**

By signing, I acknowledge that I have received, read, understand and shall comply with the FirstGroup America Drug and Alcohol Policy. I have also received the required 60 minutes of training on the effects and consequences of prohibited drug use.

Name: _____

Company/Location Code: _____ Position: _____

Signature: _____ Date: _____

(Return this form to your Supervisor for inclusion in your drug and alcohol file)

Drug and Alcohol Policy Contact Information

Corporate Contacts

Any questions about the Drug and Alcohol Policy or any aspect of the Company's drug- and alcohol-free program should first be referred to your direct Manager and/or the Designated Employer Representative (DER). If you are unable to seek resolution at your local office please seek assistance through the below contacts:

- National Drug and Alcohol Compliance Administrator (513) 684-8736
600 Vine Street, STE 1400
Cincinnati, Ohio 45014
- Corporate Human Resources (513) 241-2200

Drug Testing Laboratories

The following DHHS-certified laboratories have been designated by FirstGroup America to conduct the analysis of all urine specimens tested under the terms of this policy.

Name: Laboratory Corporation of America (LabCorp)
Address: 1904 Alexander Drive
Research Triangle Park, NC 27709

Quest Diagnostics
101001 Renner BLVD
Lenexa, KS 66700

Medical Review Officer

The following physician(s) has been designated by FirstGroup America to perform Medical Review Officer functions for all drug tests conducted under the terms of this policy.

Name: Dr. T.E. Simo
Address: 4600 Park Rd, Suite 500
Charlotte, NC 28209
Phone: 800-733-1676 or 804-346-1010

Local Substance Abuse Professional

Substance Abuse Professional (SAP) services, including information, referral, assessment, and evaluation, are available from the following Companies can be found in appendix B. please fill out below

Name: _____

Address: _____

Phone: _____

Local DER

Name: _____

Phone: _____

GENERAL INFORMATION: EFFECTS OF CONTROLLED SUBSTANCE AND ALCOHOL

Alcohol

Alcohol is the most commonly abused substances in the United States. It is a depressant and it slows down physical responses and progressively impairs mental functions. Signs and symptoms of use include the following:

- Dulled mental processes
- Lack of coordination
- Odor of alcohol on breath
- Possible constricted pupils
- Sleepy reaction rate
- Slurred speech

Chronic consumption of alcohol (average of three serving per day of beer [12 ounces], whiskey [1 ounce], or wine [6-ounce glass]) over time may result in the following health hazards:

- Neurological problems, including dementia and stroke
- Cardiovascular problems
- Cancer of the mouth, throat, esophagus, liver, and colon. In general, the risk of cancer increases with increasing amounts of alcohol.
- Liver diseases, including alcohol hepatitis and cirrhosis.
- Gastrointestinal problems, including pancreatitis and gastritis
- Psychiatric problems, including depression, anxiety, and suicide

Cannabinoids/Marijuana

Marijuana is a solid form made of THC. THC binds to certain nerve cells and kicks off a series of cellular reactions that ultimately lead to the high by affecting other chemical processes. Within a few minutes of inhaling marijuana smoke, a person will experience one or more of the following:

- Dreamy relaxation
- An increased or vivid sense of smell, taste, and hearing
- A dry mouth
- Rapid heartbeat
- Some loss of coordination
- Poor sense of balance
- A distorted sense of distance
- A diminished sense of time
- Slower muscular reaction times
- A general feeling of intoxication

Use of marijuana has both short term and long term health effects such as:

- Problems with the transfer of information from short to long term memory, and thus difficulty learning/remembering

- Distorted visual perception
- Difficulty thinking clearly
- Decreased ability to solve problems
- Loss of muscular coordination
- Increased heart rate
- Lung and other cancers, decreased immune responses and a significant decrease in the ability to learn new information
- A stronger tolerance for the drug, which requires increased dosage
- Increased risk of heart attacks
- Increased difficulty sustaining and shifting attention even in emergency situations
- Increased difficulty registering, organizing, and applying information which at first lasts several days after the "high", and can continue for many weeks
- Brain cell damage
- Mood swings as the drug ebbs and flows in the body
- Altered psycho-social behavior which can manifest as a lack of caring
- The development of an entire new set of friends who "use."

Cocaine and Crack Cocaine

Cocaine is a powerfully addictive central nervous stimulant that directly affects the brain but is also a topical deadening agent. Cocaine closes down the blood vessels that supply blood to the body. Ingestion of cocaine results in the user feeling:

- Euphoric;
- Energetic;
- Talkative;
- Mentally alert, especially to the sensations of sight, sound, and touch;
- Without appetite; and
- With little need for sleep.

Use of cocaine has both short term and long term health effects such as:

- Bizarre, erratic, and violent behavior;
- Tremors;
- Nose bleeds;
- Paranoia;
- Restlessness;
- Irritability;
- Anxiety;
- Sudden death;
- Constricted blood vessels;
- Increased temperature;
- Increased heart rate;
- Dilated pupils; and
- Increased blood pressure.

Amphetamines/Methamphetamines – Amphetamines/Methamphetamines is a highly altered chemical mixture that releases large amounts of neurotransmitter dopamine and has a stimulant-like effect. Use of Amphetamines/Methamphetamines has both short term and long term effects to your health such as:

- A “rush”;
- Increased activity level;
- Decreased appetite;
- Heightened sense of well-being;
- Increased respiration;
- Increased body temperature;
- Insomnia;
- Compulsive drug-seeking and drug use;
- Functional and molecular changes in the brain;
- Violent behavior;
- Anxiety;
- Confusion;
- Mood disturbances and delusions;
- Pain and withdrawal; and
- Homicidal and/or suicidal thoughts.

Opiates

Opiates are a broad family derived from the processing of opium, which is extracted from the seed pod of certain varieties of poppy plants. The morphine derived from this process is one of the most powerful painkillers known. Heroin is the more famous of the opiates and is highly addictive. Use of opiates has both short term and long term effects to your health such as:

- Drowsiness lasting for several hours;
- Clouded mental function;
- Slowed heart rate;
- Severely slowed breathing;
- A warm flushing of the skin;
- Dry mouth;
- Heavy feeling in the arms and legs which may be accompanied by nausea, vomiting and severe itching;
- Suppression of pain;
- Addiction
- Infectious diseases (i.e., HIV/AIDS and hepatitis B and C)
- Collapsed veins
- Bacterial infections
- Abscesses
- Infection of heart lining and valves; and
- Arthritis and other rheumatologic problems.

Phencyclidine (PCP)

PCP is classified as a dissociative anesthetic and effects are unpredictable and often times trance-like. When PCP is snorted, or smoked, PCP rapidly moves from the blood to the brain to disrupt the functioning of sites known as NMDA (N-methyl-D-aspartate) receptor complexes. Use of PCP has both short term and long term effects on your health such as:

- Shallow, rapid breathing;
- Increased blood pressure;
- Increased heart rate;
- Elevated temperature;
- Feelings of detachment from reality;
- Distortions of space, time, and how the user perceives his/her body;
- Hallucinations;
- Panic;
- Fear;
- Feelings of invulnerability and exaggerated strength;
- Severe disorientation;
- Violence;
- Suicidal tendencies;
- Memory loss; and
- Addiction.

Methylenedioxymethamphetamine (MDMA, Ecstasy)

The user of Ecstasy will feel a euphoria which takes effect 15-60 minutes after beginning use and lasts for many hours. Other effects include:

- Mild intoxication;
- Relaxation;
- Euphoria;
- Discomfort
- Disorientation
- Elevated blood pressure and heart rate;
- Irritation and nervousness;
- Optical and acoustic hallucinations;
- An excited calm or peace;
- Lack of appetite;
- Feelings of well-being;
- Increase in physical and emotional energy;
- Increased sociability and closeness;
- Heightened sensitivity;
- Increased responsiveness to touch;
- Changes in perception and;
- Empathy.

At higher doses and long terms use:

- Agitation;
- Panic attacks;
- Illusory or hallucinatory experiences may occur;
- Cerebral hemorrhage;
- Frequent bouts of dysphoria;
- Heart and circulatory failure;
- Neurotoxicity;
- Paranoid psychoses and;
- Stroke
- Users develop a strong psychological dependence on the drug. Chronic users develop increasing tolerance as they increase their doses. Those undergoing withdrawal will suffer bouts of depression and headaches.

Semi-Synthetic Opioids (i.e. hydrocodone, hydromorphone, oxymorphone, and oxycodone)

When you have a mild headache or muscle ache, an over-the-counter pain reliever is usually enough to make you feel better. But if your pain is more severe, your doctor might recommend something stronger -- a prescription opioid. Opioids are a type of narcotic pain medication. Common types are oxycodone (OxyContin), hydrocodone (Vicodin), morphine, and methadone. They can have serious side effects if you don't use them correctly.

Opiates usually produce a "high" of some type; the faster-acting they are, the more intense the high they produce. Heroin produces a very intense high thanks to its very short duration of action: its half-life is between 15 and 30 minutes. Morphine is much longer, lasting from 4 to 6 hours.

The short-term effects of opiate use can include:

- Feelings of euphoria.
- Pain relief.
- Drowsiness.
- Sedation.

Because of the intense high produced by the interaction of several opiates and the brain, the drugs remain extremely addictive, sometimes causing measurable symptoms of addiction in under three days.

**SAFETY COMPLIANCE REPORT/
TERMINAL RECORD UPDATE**

CHP 343 (Rev 12-17) OPI 062

NEW TERMINAL INFORMATION ☒ Yes ☐ No	CA NUMBER 100967	FILE CODE NUMBER 392590	COUNTY CODE 19	BED N/A
TERMINAL TYPE ☐ Truck ☒ Bus ☐ Mod Limo	CODE B	OTHER PROGRAM(S) None	LOCATION CODE 525	SUBAREA S31

CARRIER LEGAL NAME First Transit, Inc.	TERMINAL NAME (IF DIFFERENT) N/A	TELEPHONE NUMBER (W/AREA CODE) (626) 448-9446
---	-------------------------------------	--

TERMINAL STREET ADDRESS (NUMBER, STREET, CITY, ZIP CODE)

4337 Rowland Ave. El Monte, CA 91731

MAILING ADDRESS (NUMBER, STREET, CITY, STATE, ZIP CODE) (IF DIFFERENT FROM ABOVE)

4337 Rowland Ave. El Monte, CA 91731

INSPECTION LOCATION (NUMBER, STREET, CITY OR COUNTY)

4337 Rowland Ave. El Monte, CA 91731

LICENSE, FLEET AND TERMINAL INFORMATION

HM LIC. NO. N/A	HWT. REG. NO. N/A	IMS LIC. NO. N/A	TRUCKS AND TYPES N/A	TRAILERS AND TYPES N/A	PASS VEH. BY TYPE I 47 II N/A Mod Limo N/A	DRIVERS 38	BIT FLEET SIZE Powered N/A
EXP. DATE N/A	EXP. DATE N/A	EXP. DATE N/A	REG. CT N/A	HW VEH. N/A	HW CONT. N/A	PPB / CSAT ☐ Yes ☒ No ☐ N/A	Towed N/A
TERMINALS IDENTIFIED IN SECTION 34515(b) CVC ☐ Yes ☒ No			FILE CODE NUMBERS OF TERMINALS INCLUDED IN INSPECTION AS A RESULT OF SECTION 34515(b) CVC N/A				

EMERGENCY CONTACTS (In Calling Order of Preference)

EMERGENCY CONTACT (NAME) Heidi Miller	DAY TELEPHONE NO. (W/AREA CODE) (626) 448-9446 ext. 117	NIGHT TELEPHONE NO. (W/AREA CODE) (626) 216-7568
EMERGENCY CONTACT (NAME)	DAY TELEPHONE NO. (W/AREA CODE)	NIGHT TELEPHONE NO. (W/AREA CODE)

ESTIMATED CALIFORNIA MILEAGE FOR THIS TERMINAL LAST YEAR [2017]

A ☐ UNDER 15,000	B ☒ 15,001— 50,000	C ☐ 50,001— 100,000	D ☐ 100,001— 500,000	E ☐ 500,001— 1,000,000	F ☐ 1,000,001— 2,000,000	G ☐ 2,000,001— 5,000,000	H ☐ 5,000,001— 10,000,000	I ☐ MORE THAN 10,000,000
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OPERATING AUTHORITIES OR PERMITS

PUC ☒ T 24770	☒ TCP N/A	MOTOR CARRIER OF PROPERTY PERMIT ACTIVE ☐ Yes ☐ No ☒ N/A	IMS FITNESS EVALUATION ☐ Yes ☒ No
USDOT 1002211	☒ MC 576222	☐ MC N/A	REASON FOR INSPECTION Annual Bus Inspection

INSPECTION FINDINGS		INSPECTION RATINGS: S = Satisfactory U = Unsatisfactory C = Conditional UR = Unrated N/A = Not Applicable									
REQUIREMENTS	VIOL	MAINTENANCE PROGRAM		DRIVER RECORDS		REG. EQUIPMENT		HAZARDOUS MATERIALS		TERMINAL	
MAINTENANCE PROGRAM	1	1 S 2 S 3 S 4 S		1 S 2 S 3 S 4 S		1 S 2 S 3 S 4 S		1 N/A 2 N/A 3 N/A 4 N/A		1 S 2 S 3 S 4 S	
DRIVER RECORDS	1	No. 9 Time 2.5		No. 19 Time 6.5		No. 9 Time 7.0		TIME N/A		TOTAL TIME 16.0	
DRIVER HOURS		HAZARDOUS MATERIALS ☒ No H/M Transported ☐ No H/M violations noted		CONTAINERS/TANKS No. N/A Time N/A		VEHICLES PLACED OUT-OF-SERVICE Vehicles 2 Units N/A					

BRAKES	
LAMPS & SIGNALS	
CONNECTING DEVICES	
STEERING & SUSPENSION	3
TIRES & WHEELS	1
EQUIPMENT REQUIREMENTS	5
CONTAINERS & TANKS	
HAZARDOUS MATERIALS	

REMARKS

Information

13CCR 1233 - Terminal is rated satisfactory at this time, see attached report for additional information.

INSPECTION TYPE ☐ I ☐ R	NON-BIT ☐	CPSS ☐ Yes ☐ No	CHP 343 ☐	CHP 100D COL. 6	INSPECTION DATE(S) 6/22, 6/26, 6/27, 6/28	TIME IN	TIME OUT
INSPECTED BY (NAME(S)) J. Paz					ID NUMBER(S) A12829	SUSPENSE DATE ☒ Auto ☐ None	

MOTOR CARRIER CERTIFICATION

I hereby certify that all violations described hereon and recorded on the attached pages (2 through 15), will be corrected in accordance with applicable provisions of the California Vehicle Code and the California Code of Regulations. I understand that I may request a review of an unsatisfactory rating by contacting the Motor Carrier Safety Unit Supervisor at (323) 644-9557 within 5 business days of the rating.

TERMINAL RATING SATISFACTORY	CARRIER REPRESENTATIVE'S SIGNATURE 	DATE 6/28/2018
CARRIER REPRESENTATIVE'S PRINTED NAME Heidi Miller	TITLE General Manager	DRIVER LICENSE NUMBER STATE CA

Destroy Previous Editions

California Highway Patrol

	US DOT # 1002211		Legal: FIRST TRANSIT INC Operating (DBA):	
	MC/MX #: 576222		State #: 100967	
Federal Tax ID: 23-1716119 (EIN)				
Review Type: Non-ratable Review - Special Study				
Scope: Terminal		Location of Review/Audit: Company facility in the U. S.		Territory: C
Operation Types Interstate Intrastate				
Carrier: Non-HM Non-HM		Business: Corporation		
Shipper: N/A N/A		Gross Revenue: for year ending:		
Cargo Tank: N/A				
Company Physical Address:				
600 VINE STREET CINCINNATI, OH 45202-2400				
Contact Name: Heidi Miller				
Phone numbers: (1) 626-448-9446 (2) Fax				
E-Mail Address:				
Company Mailing Address:				
600 VINE STREET CINCINNATI, OH 45202-2400				
Carrier Classification				
Authorized for Hire		Other: CPUC24770		
Cargo Classification				
Passengers				
Equipment				
	Owned	Term Leased	Trip Leased	Owned Term Leased Trip Leased
Minibus, 16+	47	0	0	
Power units used in the U.S.: 47				
Percentage of time used in the U.S.: 100				
Does carrier transport placardable quantities of HM? No				
Is an HM Permit required? N/A				
Driver Information				
	Inter	Intra	Average trip leased drivers/month: 0	
< 100 Miles:		38	Total Drivers: 38	
>= 100 Miles:			CDL Drivers: 38	





State of California Secretary of State

Statement of Information

(Foreign Corporation)

FEES (Filing and Disclosure): \$25.00.

If this is an amendment, see instructions.

IMPORTANT – READ INSTRUCTIONS BEFORE COMPLETING THIS FORM

F

FY18753

FILED

In the office of the Secretary of State
of the State of California

JUL-23 2018

1. CORPORATE NAME
FIRST TRANSIT, INC.

2. CALIFORNIA CORPORATE NUMBER C0827053

This Space for Filing Use Only

No Change Statement (Not applicable if agent address of record is a P.O. Box address. See instructions.)

3. If there have been any changes to the information contained in the last Statement of Information filed with the California Secretary of State, or no statement of information has been previously filed, this form must be completed in its entirety.

☐ If there has been no change in any of the information contained in the last Statement of Information filed with the California Secretary of State, check the box and proceed to Item 13.

Complete Addresses for the Following (Do not abbreviate the name of the city. Items 4 and 5 cannot be P.O. Boxes.)

4. STREET ADDRESS OF PRINCIPAL EXECUTIVE OFFICE CITY STATE ZIP CODE
600 VINE STREET SUITE 1400, CINCINNATI, OH 45202

5. STREET ADDRESS OF PRINCIPAL BUSINESS OFFICE IN CALIFORNIA, IF ANY CITY STATE ZIP CODE

6. MAILING ADDRESS OF THE CORPORATION, IF DIFFERENT THAN ITEM 4 CITY STATE ZIP CODE

Names and Complete Addresses of the Following Officers (The corporation must list these three officers. A comparable title for the specific officer may be added; however, the preprinted titles on this form must not be altered.)

7. CHIEF EXECUTIVE OFFICER/ ADDRESS CITY STATE ZIP CODE
BRADLEY THOMAS 705 CENTRAL AVE. SUITE 300, CINCINNATI, OH 45202

8. SECRETARY ADDRESS CITY STATE ZIP CODE
MICHAEL L. PETRUCCI 600 VINE STREET SUITE 1400, CINCINNATI, OH 45202

9. CHIEF FINANCIAL OFFICER/ ADDRESS CITY STATE ZIP CODE
JAMES TIPPEN 600 VINE STREET SUITE 1400, CINCINNATI, OH 45202

Agent for Service of Process If the agent is an individual, the agent must reside in California and Item 11 must be completed with a California street address, a P.O. Box address is not acceptable. If the agent is another corporation, the agent must have on file with the California Secretary of State a certificate pursuant to California Corporations Code section 1505 and Item 11 must be left blank.

10. NAME OF AGENT FOR SERVICE OF PROCESS
C T CORPORATION SYSTEM

11. STREET ADDRESS OF AGENT FOR SERVICE OF PROCESS IN CALIFORNIA, IF AN INDIVIDUAL CITY STATE ZIP CODE

Type of Business

12. DESCRIBE THE TYPE OF BUSINESS OF THE CORPORATION
PUBLIC TRANSIT, PARATRANSIT SE

THE INFORMATION CONTAINED HEREIN IS TRUE AND CORRECT.

07/23/2018

MANDY HENDRICKS

POWER OF ATTORNEY

DATE

TYPE/PRINT NAME OF PERSON COMPLETING FORM

TITLE

SIGNATURE

SI-350 (REV 01/2013)

APPROVED BY SECRETARY OF STATE

FleetWatch User "Statement of Confidentiality"

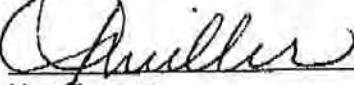
The Customer Representative who signed the Compliance Agreement does not have to complete this form. Any additional Users on the account must complete this form.

As an employee, principal, officer, temporary employee or subcontractor of Customer you may have access to official government motor vehicle and/or driver record information contained in SAMBA information reports ("Records"). The Confidentiality of the information contained within these Records shall be maintained at all times. Information contained in records shall not be distributed, sold or shared with any third party nor used by you in any way except as expressly authorized by law. Disclosure of such information may be cause for criminal and/or civil legal action against you, Customer, and any involved third party. The State providing Records shall not be in any way responsible for defense of any such action.

Pursuant to State and Federal law, any person who willfully and knowingly obtains, resells, transfer, or uses information in violation of law may be subject to criminal charges and/or liable to any injured party for treble damages, reasonable attorneys' fees, and costs. Other civil and criminal laws may also apply.

I hereby acknowledge that I am and shall remain in compliance with all State and Federal laws and the contractual terms and conditions between Customer and SAMBA pertaining to the security and confidentiality of motor vehicle and driver records.

USER INFORMATION



User Signature

6/15/09

Date

Heidi Miller

Printed Name

General Manager

Title

heidi.miller@firstgroup.com

Email address

626-448-9446

Phone

Customer/Company Name: First Transit El Monte

Assign these Driver List(s) to me (or write "N/A"): C A E P N

Check one of the following statements:

- ☐ I am a FleetWatch Account User. (Another person is the Account Administrator.)
☒ I am the FleetWatch Account Administrator. (Only one allowed per Customer.)

ADMINISTRATOR or MANAGER AUTHORIZATION

(Ignore this section if the person above is the Account Administrator.)

By signing below, I certify that I am an authorized representative of Customer, and I certify that I have the authority to grant FleetWatch access for the User named above.

Administrator or Manager Signature

Date

Dee Garnet

Administrator or Manager Printed Name

District DDS Manager

Administrator or Manager Title

Fax this form to SAMBA at: 415-962-0542



**INFORMATION SERVICES PROGRAM
EMPLOYER PULL NOTICE PROGRAM
AGENT AUTHORIZATION**

EMPLOYER

NAME OF APPROVED EMPLOYER

First Transit El Monte

PHYSICAL ADDRESS

4337 Rowland Ave.

CITY

El Monte

STATE ZIP CODE

CA 91731

NAME OF CONTACT PERSON

Heidi Miller

TELEPHONE NUMBER

(626) 448-9446

REQUESTER CODE

EPN AGENT

NAME OF PRE-APPROVED AGENT

SAMBA Holdings, Inc.

PHYSICAL ADDRESS

1730 Montano Road, NW

CITY

Albuquerque

STATE ZIP CODE

NM 87107

NAME OF CONTACT PERSON

Sandy Greenfield

TELEPHONE NUMBER

(505) 797-2622

REQUESTER CODE

U7623

The above named Approved Employer, hereinafter referred to as "Employer", hereby authorizes the above named Approved EPN Agent, hereinafter referred to as "EPN Agent" to act on the Employer's behalf to perform specific tasks associated with the Employer Pull Notice (EPN) Program as specified in California Vehicle Code (CVC) Section 1808.1.

EPN Agent will be authorized to perform the following functions on behalf of the Employer.

- a. Add and delete authorized employer's drivers.
- b. Receive, interpret, and transmit the EPN driver license record(s) in their entirety to the Employer within three (3) days of receipt.
- c. Receive billing notices and submit payment on Employer's behalf.

Employer acknowledges and understands that:

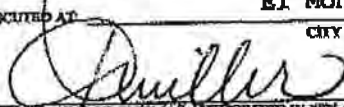
1. Utilizing an EPN Agent does not absolve the Employer of any responsibility for compliance with the provisions described in the CVC Section 1808.1.
2. Hereinafter all record information will be exclusively forwarded to the EPN Agent, Employer will not have the option of requesting record information to be sent to the Employer's place of business until this authorization is rescinded.
3. Upon obtaining the services of an EPN Agent, Employer must notify DMV (by telephone or fax) and request a billing statement of all unpaid charges. EPN Agent will then submit total payment of unpaid balance, on Employer's behalf, enabling the EPN Agent to begin with a new billing cycle and balance.
4. Employer agrees to notify DMV, in writing, at least 2 weeks prior to terminating the services of the EPN Agent. Upon receipt of notification all record information will revert back to the Employer's address of record.

For expediency, Employer may fax the EPN Agent termination notice followed by written notification; however, the fax is not to be utilized to accomplish other business needs without prior approval from DMV. Employer will forward notices to:

Department of Motor Vehicles
Information Services Branch
ATTN: EPN Agent Coordinator MS H225
PO Box 942890
Sacramento, CA 94290-0890
(916) 657-5583 (Office)
(916) 657-5907 (FAX)

5. Employer acknowledges that DMV records contain restricted information, and Employer has read and understands the provisions of CVC Section 1808.47.
6. Employer and EPN Agent understands and acknowledges that any failure to maintain confidentiality is both civilly and criminally punishable pursuant to CVC Sections 1808.45 and 1808.46.
7. Employer understands, acknowledges and agrees to absolve and hold harmless the department in any failure on the part of the EPN Agent's non-compliance of agreements established as a result of this process.
8. Employer understands, acknowledges and agrees to absolve and hold harmless the department in any failure on the part of the EPN Agent for non-receipt of driver record information in a timely manner.
9. Should the Department of Motor Vehicles (DMV) cancel, revoke, or terminate the EPN Agent's authority to obtain DMV records, the EPN Agent/Employer relationship shall immediately be dissolved and EPN Agent must return all DMV records back to the Employer's address of record within 48 hours.
10. EPN Agent will submit this Authorization form to DMV, and a copy of the Authorization form containing the Employer's signature must be retained at the Employer's place of business, and made available upon request to DMV Audit staff and the California Highway Patrol.
11. DMV record information must be presented in its entirety either in the pre-approved hardcopy format as provided by DMV to the EPN Agent, or if electronic, the date and unique identifier of the individual reviewing the driver record must be placed on the electronic records received from DMV at the time first reviewed. The identifiers must be permanent and unalterable.

I certify under penalty of perjury, under the laws of the State of California, that I have read and understand the above terms, and agree to comply with the requirements contained herein.

EXECUTED AT	El Monte	Los Angeles	CA
	CITY	COUNTY	STATE
		General Manager	05/05/2009
SIGNATURE OF EMPLOYER (AS AUTHORIZED IN EPN AGREEMENT)		TITLE	DATE
Heidi Miller		General Manager	
PRINTED NAME OF EMPLOYER		TITLE	

IMPORTANT

Information provided on this form is public record, unless expressed otherwise in statute.
No confidential information will be released to the general public.
Applicant must retain a copy of this authorization for their records.

Brent Johnson

General Manager



Skills

Twelve years of experience in transportation industry

Proven track record exceeding performance standards

Strong project management skills

Ability to multi-task in fast paced environment

Experience in budgetary/fiscal administration

Education

Victor Valley College, *Fire Service Certificate*

Professional Experience

First Transit, Inc., El Monte, CA

General Manager, 2018-Present

- Handles all contractual services including administrative functions, operations, information systems, parts purchasing, and inventory control
- Ensures compliance of all company procedures and policies
- Develops budget and action plans to improve operational efficiencies.
- Maintains company and contractual assets (vehicles, facilities, inventories, tools, and equipment)
- Ensures compliance of local, state, and federal laws and regulation (EPA, OSHA, DOT, ADA, and EEOC)
- Analyzes, prepares, and develops budgets and forecasts
- Assesses resource needs, problems, trends and plans accordingly
- Develops action plans to ensure customer retention
- Creates and maintains a safe working environment
- Provides and promotes effective communications with customers
- Provides leadership and guidance to develop location and company bench strength
- Ensures client, corporate, and contractual reporting requirements are met

Southland Transit, El Monte, CA

Project Manager, 2018

- Assumed overall responsibility for the operations of three projects in LA and Riverside counties
- Provided strategic planning and direction to the operations; responsible for the budget, and safety of drivers and passengers
- Maintained overall responsibility for scheduling, performance evaluation, and staffing for the facility management staff
- Supervised dispatch, maintenance and field operations
- Prepared all reports for the clients

Assistant General Manager, Perris, CA, Feb 2018 – Nov 2018

- Provided general guidance to department managers, which included Operations, Customer Service/Call Center, Finance/Payroll, Human Resources, Maintenance
- Provided strategic planning and direction to the operations; was responsible for the budget, safety and risk
- Administered Human Resources duties such as hiring and termination
- Maintained responsibility for scheduling and performance evaluations of staff
- Responsible for the day to day operations of the ADA contract
- Oversaw ADA Reservationists, Dispatchers, Road Supervisors, Admin staff (200 employees and fleet of 104 busses)

Transdev, Perris, CA

Assistant General Manager, 2016-2018

- Oversaw Department Managers in Operations, Customer Service/Call Center, Finance/Payroll, Human Resources, Maintenance
- Responsible for strategic planning, operations, budget, and safety
- Managed scheduling, performance evaluations, and staffing responsibilities
- Managed ADA contract
- Responsible for operation of 230 employees and a fleet of 120 buses including ADA Reservationists, Dispatchers, Road Supervisors, and admin staff positions

Senior Operations Supervisor, Hesperia, CA 2014-2015

- Responsible for the day to day operations of fixed route contract
- Oversaw ADA Reservationists, Dispatchers, Road Supervisors, 125 Bus Operators and 92 coaches
- Worked directly with Assistant General Manager to ensure the operation ran smoothly
- Coordinated with respective departments pertaining to safety and maintenance issues
- Administered Transdev's Alcohol and Substance abuse policy
- Ensured operators were adhering to safety procedures per company standards
- Ensured location performance was both effective and efficient
- Monitored all staff performance and mentored staff in operations
- Transported approximately 1,965,912 passengers in 2014
- Investigated, monitored, and ultimately reduced complaints
- Reviewed on-board video to investigate customer complaints
- Investigated incidents on the buses with road supervisors
- Coached/disciplined operators for unsafe habits utilizing SmartDrive

ADA Supervisor, Hesperia, CA 2013-2014

- Responsible for the day to day operations of para-transit contract
- Oversaw ADA Reservationist, Dispatchers, 45 Bus Operators and 30 coaches
- Oversaw the scheduling of all rides via Trapeze
- Ensured that daily manifests were completed for billing purposes
- Ensured daily pick-ups were performed on time
- Ensured the auto schedule was set-up 14 days in advance
- Reviewed time cards to ensure that wage order nines were captured properly
- Generated and mailed no-show letters
- Reviewed daily Trapeze reports
- Assisted with operator schedules
- Ensured payroll was completed
- Responsible for reviewing, investigating, and answering customer complaints
- Ensured that Reservationist/Dispatcher schedule were completed

- 
- Assisted with monthly employee safety meetings
 - Conducted weekly ride checks with operators to observe driving habits and ensure proper customer service

Road Supervisor, Hesperia, CA 2011-2013

- Performed all vehicle operator safety evaluation ride checks
- Observed bus operators while making their daily runs
- Prescribed the necessary retraining if needed
- Maintained radio and telephone contact with transit vehicle operator
- Dispatched part-time as needed
- Responded to service problems including rerouting, accidents, and incidents, with the goal of restoring interrupted service
- Supported operators in preparing accident reports
- Investigated and responded to unsafe location/situation reports
- Made recommendations and/or changes to resolve any unsafe situations

Operator, Hesperia, CA 2007-2011

- Transported passengers safely and timely on specific routes around the city
- Abided by local city, state and federal transportation laws
- Interacted with the public and provided professional customer service
- Assisted passengers with disabilities
- Provided highest quality of customer service

Juan Casillas

Operations Safety
Manager



Skills

Leader of Safety Solution
Team

Expert in Federal, State, City
compliance issues

Proficient in transit operation
procedures

Strong project management

Effective leader and
communicator

Strong knowledge of health
and safety regulations

Professional Experience

First Transit, Inc., El Monte, CA

Operations Safety Manager, 2013-Present

- Manages day-to-day transit operations
- Ensures all services are meeting company and client expectations
- Responsible for hiring and training new drivers
- Ensures drivers have daily documentation necessary to complete their routes
- Ensures vehicles dispatched are in proper working condition and that daily pre and post trip forms are submitted
- Coordinates dispatching, in-service monitoring, and turn-in activities of daily service
- Completes necessary daily/weekly reports for management
- Tracks and maintains employee attendance and processes driver and operations staff vacation requests
- Leads monthly Safety Meetings and regular Pep Rallies and Employee Appreciation Days
- Responsible for facility safety
- Documents and reports collisions and work-related injuries
- Performs background checks and drug and alcohol testing
- Maintains all operator certifications; manages compliance for internal and external audits
- Leads Safety Solution Team; researches monthly discussion topics aimed to improve customer relations, safety concerns that drivers face, and facility safety
- Provides direction and guidance to trainers; develops and monitors contents of classroom training
- Teaches classes; schedules and conducts re-cert and re-training
- Develops cost saving recommendations in regards to reports

Swift Transportation, Wilmington, CA

Container Fleet Support/Driver Manager, 2011-2013

- Responsible for management of day-to-day operations
- Assisted freight driver with customer support
- Provided technical support
- Maintained ocean containers that derived from the Port of Los Angeles
- Assisted drivers with QUALCOMM computer work including providing billing, access, appointment and container numbers
- Distributed work to all Swift Transport drivers including chassis, empty containers, flatbeds, and paying mileage

Miguel Moreno

Maintenance Manager



Skills

Over ten years of experience in the transportation industry

Proficient in methods, tools, and equipment used for journey-level repairs

Experienced in air and hydraulic brake systems

Strong knowledge of health and safety regulations

Certificates

NGVI CNG Fuel Inspector Training

Thomas Saf-T-Liner C2 Familiarization

Thomas Service Link C2

Ricoh S&K Series Training

Roush Clean-Tech

Professional Experience

First Transit, Inc., El Monte, CA

Maintenance Manager, 2019-Present

- Schedules and administers fleet maintenance, assists in troubleshooting problems with equipment
- Communicates availability of vehicles for service with dispatch and other operations personnel
- Responsible for technician training and development; planning and directing work; disciplining and performance reviews
- Provides status of maintenance and budget requirements to General Manager and Region Maintenance Manager
- Ensures compliance of State, Federal and First Transit requirements
- Reviews repair orders

MV Transportation, Paramount, CA

Lead Technician, 2016-2018

- Responsible for eight units, CNG Blue Bird Models
- Repaired air brakes on fleet
- Mounted and balanced tires manually or by use of tire machine installation
- Spearheaded PMI inspections and repairs
- Oversaw engine diagnostics and repairs; coolant and heating repairs; A/C repairs

First Transit, Carson, CA

Maintenance Manager, 2014-2016

- Responsible for a 15-unit fleet comprised of CNG Chevy Kodiak, Allison and Trans
- Diagnosed and made Cummins repairs
- Kept detailed record keeping of fleet maintenance
- Responsible for all PMI inspections

MV Transportation, Irvine, CA

Maintenance Manager, 2013-2014

- Responsible for a 14-unit fleet of CNG Ford F550s
- Managed all PMI inspections
- Performed all CNG repairs
- Responsible for CHP preparations
- Performed all A/C repairs

MV Transportation, La Mirada, CA

Maintenance Manager, 2011-2013

- Responsible for a 12-unit fleet comprised of CNG Ford E450 and Chevy Kodiak 5500 vehicles
- Managed all fleet inspections and repairs
- Created all shift assignments and supervised subordinates
- Managed wheel chair lifts and repairs

Service Technician, Paramount, CA 2008-2011

- Performed PMI inspections
- Maintained fleet by performing repairs
- Responsible for all air brake repairs

Ford, Santa Monica, CA

Service Technician, 2005-2008

- Performed service tune-up, front and rear brakes including rear drum assembly and ABS system
- Troubleshooted engine issues
- Responsible for air conditioning and heating repairs
- Performed PDI preparation of new vehicles
- Performed front wheel alignment and suspension repairs

Bus West, Carson, CA

Service Technician, 2002-2005

- Lead PDI inspector
- Managed all CHP inspections
- Performed maintenance and repairs of fleet
- Responsible for Riccon wheel chair lift repairs
- Installed modifications of fleet
- Managed wheel chair lifts and repairs

Valerie Leyba

Road Supervisor



Skills

15 years of experience in transportation industry

Extensive fixed route and paratransit driving and dispatching experience

Strong customer service skills

Safety-oriented leader

Outstanding communication and interpersonal skills

Flexible and resourceful

Class B license with passenger and air brake endorsements

Professional Experience

First Transit, Inc., El Monte, CA

Road Supervisor, 2018-Present

- Supervise all vehicle operators directly
- Manage daily operator schedule
- Prepare and submitted to local management evaluation reports
- Conduct on-the-scene accident investigations
 - Collaborate with operators on accident and OSHA reports
 - Document any safety violations
- Train new operators, and retrains existing operators after incidents
- Observe operators on the road
 - Document any violations
 - Work with drivers to prevent future incidents
- Provide key input in customer service issues
- Monitor driver safety and performance and compliance
- Assist Operations & Safety Manager with DOT/FTA compliance
- Assist dispatch and operators as needed

First Transit, Inc., El Monte, CA

Vehicle Operator, 2017-2018

Parking Company of America, Los Angeles, CA

Vehicle Operator, 2010-2013

First Transit, Inc., Pomona, CA

Vehicle Operator, 2008-2009

Parking Company of America, Los Angeles, CA

Vehicle Operator, 2003-2007

- Drove fixed route and paratransit vehicles in a safe and courteous manner
- Performed rollout and post-trip vehicle inspections
- Assisted elderly or disabled passengers, ensuring proper seating and securing of mobility aids
- Reported to dispatch any delays, incidents, or accidents
- Collected fares
- Completed and submitted written reports concerning passengers and accidents
- Assisted dispatch often

Ezequiel Jimenez

Road Supervisor



Skills

15 years of experience in transportation industry

Bilingual – English/Spanish

Strong leadership skills

Goal-oriented

Outstanding communicator

Bold problem solver

Education

Simpson College, *Bachelor's Degree, Economics*

Professional Experience

First Transit, Inc., El Monte, CA
Road Supervisor, 2014-Present

First Transit, Inc., Arcadia, CA
Road Supervisor, 2012-2014

MV Transportation, Arcadia, CA
Road Supervisor, 2007-2012

First Transit, Inc., Arcadia, CA
Road Supervisor, 2006-2007

- Supervise all vehicle operators directly
- Manage daily operator schedule
- Prepare and submitted to local management evaluation reports
- Conduct on-the-scene accident investigations
 - Collaborate with operators on accident and OSHA reports
 - Document any safety violations
- Train new operators, and retrain existing operators after incidents
- Observe operators on the road
 - Document any violations
 - Work with drivers to prevent future incidents
- Provide key input in customer service issues
- Monitor driver safety and performance and compliance
- Assist Operations & Safety Manager with DOT/FTA compliance
- Assist dispatch and operators as needed

First Transit, Inc., Arcadia, CA
Vehicle Operator, 2005-2006

- Drove revenue vehicles daily in a safe, courteous, and reliable manner
- Performed pre/post trip vehicle inspections
- Assisted in boarding passengers who used wheelchairs or scooters, and ensured safe and timely securement
- Notified dispatch of route deviations, passenger overload, accidents, passenger incidents or issues, or bus mechanical trouble
- Collected fares electronically and manually (farebox), and communicated fare policy to passengers when necessary
- Completed and submitted written reports concerning passengers and accidents

Cecilia Pacheco

Lead Dispatch



Skills

25 years of experience in the transportation industry

Strong supervision and coordination skills

Bilingual – English/Spanish

Excellent customer service and interpersonal skills

Strong motivator

Self-motivated and attention to detail

Class B transport driver

Education

East San Gabriel Valley Regional Occupational Program and Technical Center, *Business Skills Program*

Professional Experience

First Transit, Inc., El Monte, CA

Lead Dispatch, 2007-Present

- Communicate with management regarding any process changes or updates, as well as staff issues
- Schedule and supervise employee shifts
- Organize trips for drivers' routes
- Process client requests and applications
- Dispatch drivers using IO codes
- Create department forms as necessary
- Communicate with passengers and drivers regarding schedules, routes, and break downs
- Provide drivers with alternative transportation coverage when necessary
- Dispatch mechanics to breakdowns
- Train incoming dispatchers on office policies and procedures
- Remain on-call for problem resolution and back-up for dispatchers

Dispatcher, 2005-2007

- Oversaw road service and assigned carriers
- Provided customer support by responding to questions and concerns
- Managed emergency situations, and liaised between drivers and first responders
- Managed daily service by reviewing route performance, and proactively responding to issues

Vehicle Operator, 1994-2005

- Drove one of several different buses in a safe, courteous, and reliable manner within a daily time schedule
- Maintained a strong attendance record
- Performed vehicle inspections as required
- Stopped at designated points to load and unload passengers
- Helped boarding of passengers using wheelchairs and mobility aids
- Communicated with dispatch regularly about passengers, conditions, schedule, etc.
- Assured that passengers deposited fares into the fare boxes, and communicated fare policies to passengers when necessary
- Operated on-board computer fare boxes and destination signs

Proficiencies

- Microsoft Windows environment and Office suite
- Document and form design and management

Position Description

(For electronic versions of this document, please use the tab key to move from field to field)

Position Title:	General Manager	FLSA Classification:	Exempt
Department / Location:	Operations / Region	Job Code:	*Depends on location revenue
Completed By:	Human Resources	Date:	3/17/2009

Title of this Position's Supervisor:	Regional Vice President
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Job Title(s) of Employees that Directly Report to this Position:	Varies
Total Number of Employees (direct or through subordinates) Supervised by this Position:	Varies

Job Purpose:	Initiates, develops, and maintains a successful contract relationship.
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Major Responsibilities: <i>List in order of importance</i>	1)	Handles all contractual services to include administrative functions, information systems, parts purchasing, and inventory control.
	2)	Ensures compliance of all company procedures and policies to include First Quality Management (FQM) requirements.
	3)	Ensures services are provided within budget and action plans developed and implemented to improve operational efficiencies.
	4)	Maintains company and contractual assets (vehicles, facilities, inventories, tools, and equipment).
	5)	Ensures compliance of local, state, and federal laws and regulation (EPA, OSHA, DOT, ADA, and EEOC).
	6)	Analyzes, prepares, and develops budgets and forecasts.
	7)	Negotiates operating budgets and contractual terms with customers.
	8)	Assesses resource needs, problems, and trends and plans accordingly.
	9)	Develops action plans to ensure customer retention.
	10)	Assures a safe working environment.
	11)	Provides and promotes effective communications with customers.
	12)	Provides leadership and guidance to develop location and company bench strength.
	13)	Establishes training goals and requirements for all personnel.
	14)	Satisfies client, corporate, and contractual reporting requirements and needs.
	15)	Assists in technical sales support and develops sales leads.

Describe level of decision making and list examples of common decisions made:	• Develops budgets and forecasts. • Negotiates contracts with customers.
Minimum Education & Certifications Required:	• High School Diploma or equivalent required • Bachelor's degree in Business or related field strongly preferred.
Experience & Skills Required:	• Minimum 5 years fleet management/maintenance leadership experience. • Computer literate with a good working knowledge of Microsoft Excel and Word. • Must have evidence of building solid relationships with supervisors, peers, and subordinates. • Excellent communication skills. • Demonstrated ability to build and continuously motivate highly effective teams. • Successful track record in managing budgets and/or P&L responsibility. • Ability to interface with using agencies, directors, elected officials, operators, and all levels of hourly and salaried employees, including senior management. • Must be a self-starter able to obtain successful results without supervision.
Physical Requirements & Working Conditions (include amount of travel):	Valid driver's license Incumbent must be able to move about the office and between floors; utilize standard office equipment; access filing system/cabinets; and communicate effectively and efficiently in person or by telephone.
List any additional measures applicable to this position (Revenue, Headcount, # of buses; Budgets \$ etc.):	
<i>Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. This job description reflects management's assignment of essential functions; it does not prescribe or restrict the tasks that may be assigned.</i>	

Position Description

(For electronic versions of this document, please use the tab key to move from field to field)

Position Title:	Operations and Safety Manager	FLSA Classification:	Exempt
Department / Location:	Location Operations / Varies	Job Code:	*Depends on location revenue
Completed By:	Human Resources	Date:	10/22/2010

Title of this Position's Supervisor:	General Manager
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Job Title(s) of Employees that Directly Report to this Position:	May provide work guidance or have full supervisory responsibility for day-to-day operations of location positions that may include any of the following: Driver Dispatcher Router
Total Number of Employees (direct or through subordinates) Supervised by this Position:	Varies

Job Purpose:	Assists the General Manager and/or Asst General Manager in supervising daily operations. Monitors employee performance, identifies safety issues, and addresses operational needs. Specific job responsibilities will vary by location. Manages the safety program for a large location and/or multiple small to midsize locations. Ensures compliance with federal, state and local regulations and company policy. Responsibilities include all or most of those listed below.
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Major Responsibilities: <i>List in order of importance</i>	1)	Assumes first-line supervision of location employees. Ensures company policies and procedures are followed.
	2)	Assists the General Manager in day-to-day operational oversight of location operations including billing, payroll, routing/scheduling, DOT & state Dept of Education compliance, accounts receivable and accounts payable, recruitment and hiring of location employees.
	3)	Ensures drivers have the daily documentation necessary to complete their routes. Ensures completed charter documentation for processing. Coordinates field trips by the assignment of personnel and vehicles. Ensures vehicles dispatched are in proper working condition and daily DVI (pre and post trip) forms have been submitted.
	4)	Coordinates the dispatching, in-service monitoring, and turn-in activities involved in daily transit operations. Acts as back up member of Dispatch or Scheduling team.
	5)	Develops manpower requirements for Dispatchers, Operators, and assists with evaluating trip patterns for run structure revisions.
	6)	Develops procedure manuals for Dispatchers, Road Supervisors, Drivers, and Service Personnel. Holds routine meetings with Dispatch and Scheduling staff to respond to service issues and keep staff abreast of customer or company changes and requirements.
	7)	Completes necessary daily and/or weekly reports for company and customer (stand by report, Vehicle Maintenance Report, Manpower Report, Service Quality, and Complaint / Commendation Report).
	8)	Tracks and maintains employee attendance system, processes driver and operations staff vacation requests. Maintains/orders necessary driver and staff uniforms.
	9)	Monitors and evaluates Operations activities. Includes: vehicle on-time statistics, missed runs, revenue/cost data, total work hours, total pay hours, customer complaint data, accident data, road call data, and other operations related functions.
	10)	Recommends and disciplines operations personnel. Interviews necessary drivers and staff and completes customer complaint investigations.
	11)	Informs Contract Manager of potential risks in the operation.

12)	Performs all other duties as assigned and may assist with other areas based on location needs.
13)	Administers driver hiring and compliance process (e.g., interviewing and driver selection; collecting applications; criminal background checks; credit reports; drug/alcohol testing; fingerprint checks; DOT physicals; TB Skin tests; motor vehicle records checks; I-9 forms).
14)	Provides direction and guidance to location trainers. Develops and monitors contents of classroom training to ensure compliance. Teaches classes as required. Schedules and conducts re-cert and re-training.
15)	Investigates incidents, accidents, and work-related injuries including accident investigation, accident reports, accident files, accident register, and follows up with the claims office and adjusters as necessary. Typically determines fault or preventability based on the facts identified at the scene. Provides post-accident counseling with drivers. Retrains drivers as necessary.
16)	Prepares and submits accident-related compliance forms, maintains files, and enters in DMO, or otherwise submits data to appropriate person or organization.
17)	Plans, schedules and conducts monthly safety meetings based on region and company safety and safety training goals and objectives. Assists and participates in Safety Action Team meetings. Sets up regular accident review committees to determine preventability of accidents. Responds to appeals from drivers.
18)	Provides assistance and training to drivers and attendants on passenger management and other safety related issues.
19)	Performs driver road checks of driver performance (e.g., pre-trip checks-lot-to-school and back; post-trip checks).
20)	*May supervise employees with safety and/or driver hiring or training responsibilities (e.g., Safety Coordinator, Field Supervisor, Driver Trainers/Instructors). Supervisory responsibility may range from providing work guidance and leadership to full supervisory duties* such as hiring, selecting and training; setting and adjusting rates of pay and work hours; planning the work; directing tasks/activities; appraising performance; handling employee complaints; recommending and applying discipline; and monitoring legal compliance measures.
21)	Provides various reports and analyzes, including safety trends. Develops cost saving recommendations. Performs other duties and projects as assigned.

Describe level of decision making and list examples of common decisions made:	• Implements management policies and makes decisions regarding proper enforcement. • Resolves customer/parent complaints. • Recommends actions to General Manager including personnel and discipline. • Develops procedure documents.
Minimum Education & Certifications Required:	High school diploma or equivalent
Experience & Skills Required:	• 3-5 years experience in transportation. • 2-3 years supervisory experience preferred. • Accounting and detailed reporting experience. • Computer literate with working knowledge of Microsoft Office. • Ability to effectively prioritize tasks and manage time effectively. • Ability to appropriately interact with employees of all levels including drivers, customers, senior management, client representatives, union officials, and general public. • Work extended hours regularly, including weekends and holidays. • Demonstrate regular and consistent attendance and punctuality. • Possess working vehicle to travel within service area as needed. • Meet customer certification requirements in operations software and able to act as system administrator to assist resolving local user issues.
Physical Requirements & Working Conditions (include amount of travel):	Incumbent must be able to move about the office and between floors; utilize standard office equipment; access filing system/cabinets; and communicate effectively and efficiently in person or by telephone. Must be able to drive company or personal vehicle to review driver performance, meet clients, and for other company related purposes. Must be able to: • Use full range of hearing, speech, and vision • Use fingers (manual dexterity) handling paperwork • Stoop, crouch, squat, or kneel when performing inspections of any type • Bend at knee, hip, waist when performing duties • Stand while performing inspections and platform training • Be subject to wet, cold, or hot environmental conditions • Write reports in a coherent, legible way
List any additional measures applicable to this position (Revenue, Headcount, # of buses; Budgets \$ etc.):	
<i>Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. This job description reflects management's assignment of essential functions; it does not prescribe or restrict the tasks that may be assigned.</i>	

Position Description

(For electronic versions of this document, please use the tab key to move from field to field)

Position Title:	Supv Road	FLSA Classification:	Non-Exempt
Department / Location:	Operations / Field	Job Code:	7398
Completed By:	Frank Ciccarella	Date:	9/22/2008

Title of this Position's Supervisor:	General Manager / Operation Manager or Safety Manager
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Job Title(s) of Employees that Directly Report to this Position:	N/A
Total Number of Employees (direct or through subordinates) Supervised by this Position:	N/A

Job Purpose:	Serves as First Line supervisors for Drivers, customer response, driver field evaluation and accident first-responders.
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Major Responsibilities: <i>List in order of importance</i>	1)	Communicates job requirements and responsibilities to drivers.
	2)	Takes responsibility for day to day scheduling, counseling and evaluation reports to local management.
	3)	Conducts on-the-scene accident investigation; assists drivers in preparing accident reports, OSHA reports and safety violations documents.
	4)	Designs and delivers driver training and safety courses; trains new drivers and retrain those involved in accidents.
	5)	Observes drivers on the road, and corrects safety problems on the scene while documenting violations.
	6)	Liaisons between drivers and both clients and organization in customer service issues.
	7)	Evaluates and monitors driver safety and performance, as well as compliance in legal, employment and labor policy matters.
	8)	Assists Safety Manager with DOT/FTA compliance regarding drug testing and recordkeeping.
	9)	Assists in dispatching, driving, interviewing, and miscellaneous clerical tasks as needed.
	10)	Meets all driver qualifications at location.
	11)	Obtains a CDL required to operate vehicles at location, maintains that license, and drives route periodically.
	12)	Additional duties as assigned.

Describe level of decision making and list examples of common decisions made:	
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Minimum Education & Certifications Required:	High School Diploma (or equivalent)
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Experience & Skills Required:	• Supervisory experience with hourly employees, with 2-3 years of transit supervisory experience preferred • Computer literate with working knowledge of Word, Excel and PowerPoint • Familiar with basic vehicle mechanical processes and maintenance • Ability to effectively prioritize tasks and manage time effectively • Excellent verbal, written and relational communication skills, with ability to appropriately interact with employees of all levels including drivers, customers, senior management, client representatives, union officials and general public; fluent in English • Human resources and training experience • Work extended hours regularly, including Saturday • Demonstrate regular and consistent attendance and punctuality • Possess working vehicle to travel with in service area as needed • Essential Job Functions: • Use of full ranges of hearing, speech and vision • Use of fingers (manual dexterity) handling paperwork • Stoop, crouch, squat or kneel when performing inspections of any type • Bend at knee, hip, waist when performing duties • Stand while performing inspections and platform training • Be subject to wet, cold or hot environmental conditions • Write reports in a coherent, legible way
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Physical Requirements & Working Conditions (Include amount of travel):	Incumbent must be able to move about the office and between floors; utilize standard office equipment; access filing system/cabinets; and communicate effectively and efficiently in person or by telephone. Typical office environment, transit facilities, maintenance facilities and transit vehicles Physically fit to board transit vehicles and inspect both vehicles and facilities as needed
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List any additional measures applicable to this position (Revenue, Headcount, # of buses; Budgets \$ etc.):	
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<i>Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. This job description reflects management's assignment of essential functions, it does not prescribe or restrict the tasks that may be assigned.</i>

Position Description

(For electronic versions of this document, please use the tab key to move from field to field)

Position Title:	Administrative Clerk	FLSA Classification:	Non-Exempt
Department / Location:	Varies / Varies	Job Code:	7150
Completed By:	Human Resources	Date:	2/3/2010

Title of this Position's Supervisor:	Varies
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Job Title(s) of Employees that Directly Report to this Position:	N/A
Total Number of Employees (direct or through subordinates) Supervised by this Position:	N/A

Job Purpose:	Performs all administrative functions in the department or location. Interfaces with customers, vendors, and internal departments.
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Major Responsibilities: <i>List in order of importance</i>	1)	Performs project clerical and administrative details to ensure that all contractual and legal mandates are met.
	2)	Maintains contract files and records. Prepares contract correspondence, manager reports, and schedules.
	3)	Answers the phone and directs calls for the department or location.
	4)	Schedules appointments and meetings for management. Prepares agendas. Prepares and sends faxes, e-mail and mail as required.
	5)	Administers accounting data, payroll, and personnel records.
	6)	Inputs and extracts data from fleet MIS system to provide data to management and the Client.
	7)	Coordinate employee benefits at the contract level.
	8)	The above duties are not meant to restrict initiative, but rather to define minimum activities. These duties may be altered to suit the needs of the company as needed.
	9)	
	10)	
	11)	
	12)	

Describe level of decision making and list examples of common decisions made:	• Determines how to prioritize work.
Minimum Education & Certifications Required:	• High School Diploma or equivalent required
Experience & Skills Required:	• Less than 2 years administrative experience. • Office, data entry, or administrative experience a plus. • Experience with MS Office products preferred. • Excellent written and verbal communication skills.
Physical Requirements & Working Conditions (include amount of travel):	Incumbent must be able to move about the office and between floors; utilize standard office equipment; access filing system/cabinets; and communicate effectively and efficiently in person or by telephone.
List any additional measures applicable to this position (Revenue, Headcount, # of buses; Budgets \$ etc.):	
<i>Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. This job description reflects management's assignment of essential functions; it does not prescribe or restrict the tasks that may be assigned.</i>	

Position Description

(For electronic versions of this document, please use the tab key to move from field to field)

Position Title:	Lead Dispatcher	FLSA Classification:	Non-Exempt
Department / Location:	Operations / Varies	Job Code:	7131
Completed By:	Human Resources	Date:	12/2/2008

Title of this Position's Supervisor:	Varies, e.g. Operations Manager, Asst GM or General Manager
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Job Title(s) of Employees that Directly Report to this Position:	N/A
Total Number of Employees (direct or through subordinates) Supervised by this Position:	N/A

Job Purpose:	Manages filed service to provide quality customer transportation services.
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Major Responsibilities: <i>List in order of importance</i>	1)	Oversees road service assigned carriers by tracking trip performance measures, route begin on time, performance, incidents, etc.
	2)	Provides customer support by responding to questions and concerns regarding customer trips including no shows, cancellations and missed trips.
	3)	Manages emergency situations for vehicle operators; act as liaison between the carrier and emergency services.
	4)	Manages daily service by reviewing route performance and proactively responding to situations that impact customer service
	5)	May train/mentor other dispatchers.
	6)	
	7)	
	8)	
	9)	
	10)	

Describe level of decision making and list examples of common decisions made:	
Minimum Education & Certifications Required:	• High school diploma or equivalent • Technical degree preferred
Experience & Skills Required:	• 5-7 years experience • Excellent verbal and interpersonal skills. • Problem solving and analytical abilities. • Excellent customer service skills
Physical Requirements & Working Conditions (include amount of travel):	Incumbent must be able to move about the office and between floors; utilize standard office equipment; access filing system/cabinets; and communicate effectively and efficiently in person or by telephone. Sitting for extended periods of time.
List any additional measures applicable to this position (Revenue, Headcount, # of buses; Budgets \$ etc.):	
<i>Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. This job description reflects management's assignment of essential functions; it does not prescribe or restrict the tasks that may be assigned.</i>	

Position Description

(For electronic versions of this document, please use the tab key to move from field to field)

Position Title:	Dispatcher	FLSA Classification:	Non-Exempt
Department / Location:	Operations / Varies	Job Code:	7130
Completed By:	Human Resources	Date:	12/2/2008

Title of this Position's Supervisor:	Varies, for example: Sr Dispatcher, Asst General Manager, or Operations Manager
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Job Title(s) of Employees that Directly Report to this Position:	N/A
Total Number of Employees (direct or through subordinates) Supervised by this Position:	N/A

Job Purpose:	Manages filed service to provide quality customer transportation services.
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Major Responsibilities: <i>List in order of importance</i>	1)	Oversees road service assigned carriers by tracking trip performance measures, route begin on time, performance, incidents, etc.
	2)	Provides customer support by responding to questions and concerns regarding customer trips including no shows, cancellations and missed trips.
	3)	Manages emergency situations for vehicle operators; act as liaison between the carrier and emergency services.
	4)	Manages daily service by reviewing route performance and proactively responding to situations that impact customer service
	5)	
	6)	
	7)	
	8)	
	9)	
	10)	

Describe level of decision making and list examples of common decisions made:	
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Minimum Education & Certifications Required:	• High school diploma or equivalent • Technical degree preferred
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Experience & Skills Required:	• 3-5 years experience • Excellent verbal and interpersonal skills. • Problem solving and analytical abilities. • Excellent customer service skills
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Physical Requirements & Working Conditions (include amount of travel):	Incumbent must be able to move about the office and between floors; utilize standard office equipment; access filing system/cabinets; and communicate effectively and efficiently in person or by telephone. Sitting for extended periods of time.
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List any additional measures applicable to this position (Revenue, Headcount, # of buses; Budgets \$ etc.):	
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<i>Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. This job description reflects management's assignment of essential functions; it does not prescribe or restrict the tasks that may be assigned.</i>

Position Description

(For electronic versions of this document, please use the tab key to move from field to field)

Position Title:	Operator FT	FLSA Classification:	Non-Exempt
Department / Location:	Location Operations / Varies	Job Code:	0601
Completed By:	Human Resources	Date:	2/4/2011

Title of this Position's Supervisor:	General Manager/Asst GM/Operations Manager
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Job Title(s) of Employees that Directly Report to this Position:	N/A
Total Number of Employees (direct or through subordinates) Supervised by this Position:	N/A

Job Purpose:	Drives and maintains the appearance of the interior of the bus. Provides safe, reliable, and efficient transportation.
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Major Responsibilities: <i>List in order of importance</i>	1)	Drives one of several different coach/buses or company non-revenue vehicles in a safe, courteous, and reliable manner throughout the contracted service area within a daily assigned time schedule.
	2)	Maintains a strong attendance record.
	3)	Performs pre/post trip vehicle inspections as required.
	4)	Possess a functional knowledge of the demographics of the service area.
	5)	Stops at designated points to load and/or unload passengers.
	6)	May assist in the boarding of passengers using wheelchairs or other mobility aids and is required to properly secure wheelchairs and scooters.
	7)	Notifies dispatch of deviations, overload, accidents, passenger incidents, medical/behavioral problems, or bus mechanical/electrical trouble.
	8)	Assures that fares are deposited into the fare box and dispenses information. Advises passengers of rules and regulations when necessary.
	9)	Completes and submits written reports concerning passengers and all accidents.
	10)	Operates on-board computer fare boxes and destination signs.
	11)	Assumes any and all other duties assigned.

Describe level of decision making and list examples of common decisions made:	
Minimum Education & Certifications Required:	Possess or have the ability to obtain CDL Operator's license with required endorsements
Experience & Skills Required:	• Good verbal communication skills. • Ability to read, write, and speak English and perform basic mathematical procedures. • Ability to work under stress and meet strict timelines. • The ability to work early morning hours. • Must be able to work without direct supervision. • Must read and understand street signs, route sheets and maps. • Excellent communication skills • Able to work shift hours and days assigned.
Physical Requirements & Working Conditions (include amount of travel):	• Ability to verbally communicate with passengers and dispatchers/road supervisors including use of a 2-way radio and PA system. • Possess excellent or corrected vision to allow operator to have the ability to read and comprehend written material. Must have good depth perception, peripheral vision, distance vision, and color perception as is required to drive a motorized vehicle. • Possess a full range of sense of hearing, including tone, pitch, and volume when operating transit vehicle, using 2-way radio, and assisting passengers and public. • Must have good manual dexterity in order to perform the basic functions of the MDT keypad. Required to reach, grasp, and use multiple objects which include but are not limited to: a 2-way radio, door control, PA microphone, steering wheel, wheelchair lift control, and bus door control. • Required to sit while operating vehicle approximately 75% of the work day. The remaining 25% of the day will require the operator to move both in the internal and exterior perimeters of the bus, including a pre-trip inspection of the vehicle by walking around and through the vehicle. • Ability to push/pull tension of at least 50 pounds and ability to bend and stoop/kneel to assist passengers boarding and securing in wheelchair/scooters and/or to retrieve equipment. Twist at the knee and waist when operating vehicle, performing vehicle inspections, and securing wheelchairs. Reach forward, rearward, upward, and downward when operating vehicle, performing vehicle inspections, and securing wheelchairs. • Subject to wet, cold, and/or hot environmental conditions. • Subject to a low risk of injury due to vehicle accident, mechanical failure, fire, and/or explosion. • Subject to vehicle noise and vibration while operating transit vehicle. • Subject to vehicle exhaust fumes and odors, road dusts, and mist.
List any additional measures applicable to this position (Revenue, Headcount, # of buses; Budgets \$ etc.):	
<i>Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. This job description reflects management's assignment of essential functions, it does not prescribe or restrict the tasks that may be assigned.</i>	

Position Description

(For electronic versions of this document, please use the tab key to move from field to field)

Position Title:	Mgr Maintenance (Transit)	FLSA Classification:	Exempt
Department / Location:	Location Maintenance / Varies	Job Code:	*Depends on location revenue
Completed By:	Human Resources	Date:	9/2/2010

Title of this Position's Supervisor:	General Manager
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Job Title(s) of Employees that Directly Report to this Position:	Technicians Also supervises Tech in Charge if that position exists at the location
Total Number of Employees (direct or through subordinates) Supervised by this Position:	Varies, but must have <u>full supervisory authority</u> * over at least 2 employees, in order to hold this Job Title.

Job Purpose:	Supervises the maintenance and repairs of buses, other vehicles and equipment to contract requirements in branch.
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Major Responsibilities: <i>List in order of importance</i>	1)	Schedules and administers fleet maintenance, assists in troubleshooting problems with equipment. Communicates availability of vehicles for service with dispatch and other operations personnel.
	2)	*In relation to subordinates, is responsible for hiring; firing; approving salary increases or decreases; training and employee development; planning and directing the work; disciplining; handling employee complaints or grievances; and handling performance reviews. While the Mgr Maintenance is required to make personnel-related recommendations, some actions require further approval.
	3)	Works closely with the location manager and region maintenance management providing status of maintenance and budget requirements. May review financial and budget variances, review repair orders or code and approve account payable documents.
	4)	Ensures compliance on a day-to-day basis with State, Federal and Company requirements. Ensures a safe environment exists and that all maintenance and related activities are in conformance with company policies and regulatory requirements.
	5)	Reviews repair orders. May order fuel for vehicles, order parts, and subcontract repair work.
	6)	Initiates and implements projects that improve efficiency and/or reduces operating costs.
	7)	Ensures that maintenance technicians are trained on current operating procedures, are properly equipped, and motivated so that the maintenance program can be accomplished in a safe, timely and cost effective manner.
	8)	Supervises bus fueling. May arrange services for building and ground keeping.
	9)	Completes special projects as assigned. Required to perform hands-on work activities.
	10)	

Describe level of decision making and list examples of common decisions made:	• Determines how the work is to be accomplished, within company policy • Plans and distributes the work to subordinates; trains and motivates maintenance staff • Recommends various personnel actions (e.g., hire/fire, promotions, salary changes)
Minimum Education & Certifications Required:	• High school diploma or equivalent • Technical training preferred • Possess CDL Operator's license with required endorsements
Experience & Skills Required:	• 5+ years of hands-on mechanical supervisory experience • May require lifting of 20 to 50 lbs • Good written and oral communication skills • Computer skills • Industry experience repairing and maintaining diesel engines and school bus equipment is preferred
Physical Requirements & Working Conditions (Include amount of travel):	Maintenance Shop Must be able to work in a crouched position or on back lying on mechanic's dolly beneath motor vehicle equipment; subjected to dust, dirt, and grease conditions.
List any additional measures applicable to this position (Revenue, Headcount, # of buses; Budgets \$ etc.):	
<i>Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. This job description reflects management's assignment of essential functions, it does not prescribe or restrict the tasks that may be assigned.</i>	

Position Description

(For electronic versions of this document, please use the tab key to move from field to field)

Position Title:	Utility Worker/Service Employee	FLSA Classification:	Non-Exempt
Department / Location:	Maintenance / Varies	Job Code:	5060
Completed By:	Human Resources	Date:	5/27/2010

Title of this Position's Supervisor:	General Manager or Shop Foreman
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Job Title(s) of Employees that Directly Report to this Position:	N/A
Total Number of Employees (direct or through subordinates) Supervised by this Position:	N/A

Job Purpose:	Maintains and fuels all school buses, activity, and commercial buses in conjunction with First Student's Maintenance Department: dispenses fuel, checks oil, maintains accurate stick and meter readings, stocks required supplies and equipment, and coordinates the flow of buses to ensure safe operation. Performs light maintenance as necessary to buildings and grounds.
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Major Responsibilities: <i>List in order of importance</i>	1)	Opens the gates to the lot and checks bus parking areas to ensure all can be dispatched in a timely manner. Re-positions any buses that may impede the traffic in the yard.
	2)	Opens the fuel island, takes accurate stick and meter readings, and turns in inventory sheets at the end of the day.
	3)	Maintains accurate records and completes Bulk Fuel Receiving Report, Fuel Variance Report, Closing Month-end Report and Meter Calibration Report.
	4)	Notifies the Contract Manager or designee when a fuel delivery is required and ensures that accurate stick readings are taken before and after delivery. In addition, ensures that proper procedure is followed during delivery.
	5)	Checks and fills the oil, antifreeze, power steering, transmission fluid, brake fluid, windshield washer fluid and belts on buses being fueled. Ensures that adequate supplies to perform checks are maintained at the fuel island. Communicates with the shop foreman regarding supplies and oil inventory dispensed into equipment.
	6)	Twice a week, checks tires for damage and proper air pressure. Tire damage must be reported to the shop immediately.
	7)	Inspects all buses during fueling or on a regularly scheduled basis for physical damage. Any damage will be reported immediately to the Contract Manager or designee.
	8)	Maintains the required inventory in the spill barrel and notifies the Contract Manager any time supplies are used or replaced.
	9)	In the event of a fuel spill, takes all necessary steps to contain the spill. The Contract Manager or designee must be notified immediately.
	10)	Maintains adequate inventories and supplies to make minor repairs and facilitate the washing of buses.
	11)	Performs light interior and exterior maintenance on buses or trucks as required. This includes but is not limited to seat repair, two-way radio installation and replacement, AM-FM radio installation and replacement and antenna installation and replacement, mirror adjustment and replacement, jump starting buses and lamp replacement.
	12)	Cleans interiors and exteriors of buses as required to maintain cleanliness of the fleet.

	13)	Performs maintenance of buildings and grounds to include yard cleanliness, grass and weeds or any other yard projects that are assigned as necessary.
	14)	Maintains the appropriate credentials to drive a regular route or charter as required to cover the day's activities.
	15)	Picks up and delivers parts and buses as needed.
	16)	Follows all safety standards and guidelines, including but not limited to: (1) The wearing of Safety Glasses, (2) The wearing of steel-toed safety shoes, (3) Safety gloves as needed, (4) Proper attire.
	17)	Performs any other management requests or directives as requested.

Describe level of decision making and list examples of common decisions made:	
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Minimum Education & Certifications Required:	High School Diploma or equivalent required
---	--

Experience & Skills Required:	- Knowledge of bus maintenance. - Ability to ensure safety.
--	--

Physical Requirements & Working Conditions (include amount of travel):	The position requires the employee to work outdoors in varying, seasonal weather conditions.
--	--

List any additional measures applicable to this position (Revenue, Headcount, # of buses; Budgets \$ etc.):	
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<i>Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. This job description reflects management's assignment of essential functions; it does not prescribe or restrict the tasks that may be assigned.</i>	
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Position Description

(For electronic versions of this document, please use the tab key to move from field to field)

Position Title:	Technician I	FLSA Classification:	Non-Exempt
Department / Location:	Location Maintenance / Varies	Job Code:	5080
Completed By:	Maintenance	Date:	3/3/2010

Title of this Position's Supervisor:	Mgr Maintenance or Supv Shop
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Job Title(s) of Employees that Directly Report to this Position:	N/A
Total Number of Employees (direct or through subordinates) Supervised by this Position:	N/A

Job Purpose:	Performs routine maintenance, daily inspections, and minimal reworks. Maintains production standards.
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Major Responsibilities: <i>List in order of importance</i>	1)	Performs vehicle maintenance to the First Transit standards.
	2)	Diagnoses and performs accurately all phases of vehicle and equipment repair.
	3)	Removes, cleans, repairs, reinstalls, and adjusts vehicle components (Engine Emission Components, Driveline Components, Electrical/Electronic Components, Brakes/Suspension/Steering/Exhaust, Cab/Chassis, Hydraulics).
	4)	Ensures work orders are completed properly and accurately.
	5)	Selects appropriate course of action for repairs.
	6)	Evaluates completed work prior to release – seeks supervisor approval where required.
	7)	Ensures safe use of power and hand-held tools.
	8)	Performs road calls and emergency services as necessary.
	9)	Moves vehicles safely between job and work area.
	10)	Communicates professionally with customers, team members, and supervisors.
	11)	Actively participates in safety or educational training as required.
	12)	Continuous ASE re-certification is required to remain in job classification.
	13)	Other duties as assigned.

Describe level of decision making and list examples of common decisions made:	
Minimum Education & Certifications Required:	• High school diploma or equivalent • Technical training preferred • Possess CDL Operator's license with required endorsements
Experience & Skills Required:	• Minimum 1 year direct automotive repair experience (Transit or Heavy Duty Fleet preferred). • Demonstrated experience monitoring and meeting PM schedules and operations any of automotive, diesel, or CNG fleet repair shop equipment. • Minimum of 2 ASE certifications from any of the following groups or agree to obtain at least 2 of the following in a 9 month period: ○ T2, S2, H2 Diesel Engines ○ T3, S3, H3 Drive Train ○ T4, S4, H4 Brakes ○ T5, S5, H5 Suspension and Steering ○ T6, S6, H6 Electrical – Electronic Systems ○ T7, S7, H7 Heating Ventilation and A/C • Must have an appropriate mechanic's tool set. • Excellent communication skills. Bring demonstrated abilities of building solid relationships with superiors, peers, and subordinates.
Physical Requirements & Working Conditions (include amount of travel):	Maintenance Shop Must be able to work in a crouched position or on back lying on mechanic's dolly beneath motor vehicle equipment; subjected to dust, dirt, and grease conditions.
List any additional measures applicable to this position (Revenue, Headcount, # of buses; Budgets \$ etc.):	
<i>Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. This job description reflects management's assignment of essential functions, it does not prescribe or restrict the tasks that may be assigned.</i>	

ASE BONUS PROGRAM

Our employee incentive program promotes the development of our employees by rewarding those who achieve training milestones and keep their certifications current.



FirstGroup America has more ASE shops than all our competitors combined with over 145 ASE Blue Seal facilities. First Transit has 72 of those.

ASE BONUS COMPENSATION STRUCTURE

First Transit's commitment to training and the ASE certification program is made tangible through our ASE Incentive Program. Offering access to all ASE testing at no cost to the employee, there are two ways that employees can earn per hour bonuses on each hour they work.

- While working to earn his/her first Master Technician Certification, the employee will receive a \$.15 per hour bonus for each ASE test successfully completed – Upon earning his/her first Master Technician Certification, the employee will receive an additional \$1.35 per hour bonus
- While working to earn his/her second Master Technician Certification, the employee will receive a \$.05 per hour bonus in addition to his/her regular rate for each ASE test successfully completed – Upon earning his/her second Master Technician Certification, the employee will receive an additional \$.05 per hour bonus



First Transit's ASE Bonus Program is summarized below.

First Master Mechanic Certification	Number of Tests Passed	Hourly Bonus	Annual Bonus (based upon 2,080 hours)
Bonus for Tests Passed	1	\$.15	\$312.00
Bonus for Tests Passed	2	\$.30	\$624.00
Bonus for Tests Passed	3	\$.45	\$936.00
Bonus for Tests Passed	4	\$.60	\$1248.00
Bonus for Tests Passed	5	\$.75	\$1560.00

Bonus for Tests Passed	6	\$.90	\$1872.00
Bonus for Tests Passed	7	\$1.05	\$2184.00
Bonus for Tests Passed	8	\$1.20	\$2496.00
Bonus for All Tests Successfully Completed and Master Certification		\$1.35	\$2808.00

Second Master Mechanic Certification	Number of Tests Passed	Hourly Bonus	Annual Bonus (based on 2,080 hours)
Bonus for Test Passed	1	\$.05	\$104.00
Bonus for Test Passed	2	\$.10	\$208.00
Bonus for Test Passed	3	\$.15	\$312.00
Bonus for Test Passed	4	\$.20	\$416.00
Bonus for Test Passed	5	\$.25	\$520.00
Bonus for Test Passed	6	\$.30	\$624.00
Bonus for Test Passed	7	\$.35	\$728.00
Bonus for Test Passed	8	\$.40	\$832.00
Bonus for all ASE Tests Successfully Completed and Master Certification		\$.45	\$936.00

Note: Maintenance Managers earn a \$2,000-dollar bonus for their shop receiving the Blue Seal Certification.

ASE BLUE SEAL CERTIFICATION PROGRAM

First Transit places a major emphasis on the ASE Blue Seal Recognition Program that we seek to obtain for our maintenance facility.



We will achieve ASE Blue Seal status within 18 months of the contract start date for our maintenance facility.

This program recognizes that the technicians working in the ASE Blue Seal facility are properly trained and tested in their field. To attain ASE Blue Seal recognition, the repair shop must have at least 75% of technicians ASE certified. Also, each area of service offered in the facility must be covered by at least one ASE-certified technician.

KEY BENEFITS OF ASE BLUE SEAL FACILITIES

- **Safety and Quality** – ASE Blue Seal Shops are equipped with the knowledge and training required to diagnose problems precisely and accurately so that vehicles and equipment are maintained and repaired to the highest safety standards. Our clients can be assured that their fleet will experience fewer breakdowns and higher vehicle safety/availability—yielding increased customer satisfaction.
- **Efficiency** – ASE Blue Seal Shops fix it right the first time, making sure preventative maintenance and repairs are performed quickly and vehicles and equipment are delivered on-time for service.

First Transit & First Vehicle Services ASE Locations				
Springfield, OH	Houston Metro Fixed Route, Houston, TX	Houston Metro Paratransit, Houston, TX	United Airlines Employee Shuttle, Houston, TX	Kansas City Airport, Kansas City, MO
Fort Bend, TX	Rochester, MN	Burnsville, MN	Houston Airport, Houston, TX	Xenia, OH
Denver, CO	Longmont, CO	Blaine, MN	Commerce City, CO	Frankstown, PA
Johnson County, KS	Minneapolis, MN	University of Minnesota, MN	Roseville, MN	Dupage, IL
Baltimore Airport, MD	University of Alabama, AL	Durham, NC	Buffalo, NY	Corning, NY
Las Vegas Airport, NV	San Luis Obispo, CA	Tempe, AZ	Crescent City, CA	San Diego, CA
Tacoma, WA	Snohomish, WA	Mesa, AZ	Davie, FL	Ft. Lauderdale, FL
Port St. Lucie, FL	Florida DOT, FL	ExxonMobile, TX	Paramount, CA	Eastman Chemical, TX

First Transit & First Vehicle Services ASE Locations

Sumter County, FL	Seminole County, FL	Harford County, MD	Maine DOT, ME	Loudon County, VA
Williamsburg, VA	Monroe County, MI	Wilmington, DE	St. Clair County, MI	DC Metro Police, DC
Cecil County, MD	Hazlet, NJ	Montgomery, NJ	Munhall, PA	Pittsburgh, PA
Newport, RI	South Jersey Gas, NJ	Kean University, NJ	Mt. Pleasant, SC	Liberty County, GA
Richland County, SC	Thornton, CO	Darlington County, SC	Sumter, S	Jacksonville Beach, FL
Florence County, SC	Georgetown, SC	Atlantic Beach, FL	Augusta-Richmond County, GA	City of Moultrie, GA
Oklahoma City Environmental Trust, OK	Augusta-Richmond County, GA 2 nd location			

LEAN RECOGNITION

To recognize shops that have achieved Lean Maintenance Practices and have followed the 5s Processes there are three levels of awards: **Bronze, Silver, and Gold**. The requirements and criteria for each award are explained below:

Criteria/ Requirements	Bronze	Silver	Gold
Conduct 5s Event & Lean			
1. Have 5s audit been conducted on all shifts and are score above 70%?	X	X	
1. Have 5s audit been conducted on all shifts and are score above 90%?			X
2. Are previous 5s audits filed?	X	X	X
3. Have the quarterly FirstBase Lean Assessment (FLA) been conducted and reviewed with the general manager?	X	X	X
4. Is overtime managed and below budget?	X	X	X
5. Are repairs parts at or below budget?	X	X	X
6. Is tire cost at or below budget?	X	X	X
7. Is outside service cost at or below budget?	X	X	X
8. Are there liquidated damages due to maintenance?	X	X	X
Visualization			
1. Have planning sheet and 30 previous sheets filed?	X	X	X
2. Is accurate scoreboard displayed in shop?	X	X	X
Review and update standard job times			
1. Are there standard job times for the top 20 jobs?	X	X	
1. Are there standard job times for the top 30 jobs?			X
2. 65% of all work should be performed on scheduled repairs	X		
2. 75% of all work should be performed on scheduled repairs		X	X
3. All PMI parts are on work orders as suggested parts.	X	X	X

Criteria/ Requirements	Bronze	Silver	Gold
Warehouse/Parts Room			
1. Are annual inventory turns 4 or greater?	X		
1. Are annual inventory turns 5 or greater?		X	X
2. Are scheduled cycle counts being conducted?	X	X	X
3. Are repair parts bar coded?	X	X	X
4. Are 30% or greater purchased through the Auto Reorder process?	X		
4. Are 40% or greater purchased through the Auto Reorder process?		X	X
5. Are slow moving parts in inventory over 6 months of age, if so has the warehouse started a "return to vendor" process?	X	X	X
Preventive Maintenance			
1. Are 99% of preventive maintenance inspections done on time for the past 90 days	X	X	X
Inspections (People, Process & Product)			
1. Have monthly QCC audits been conduct for 10% of the fleet for the past 90 days?	X	X	X
2. Have all monthly shop and environmental inspections been performed and updated on Eios on time for the past 90 days?	X		
2. Have all monthly shop and environmental inspections been performed on time for the past 180 days?		X	X
3. Has a Peer Audit been conducted in the 12 months if so, are deficiencies completed?		X	X
4. Is there is ongoing training to improve overall technical knowledge?			X
Outstanding Defects			
1. Have all deficiencies noted from shop and environmental inspection been corrected?	X	X	X

Criteria/ Requirements	Bronze	Silver	Gold
2. Is the deferred maintenance module in FirstBase being used?	X	X	X
3. Have all items found on annual audits (Peer, Environmental, Local, State) been addressed?	X	X	X
First Transit University			
1. Has the manager completed the required 9 hours of prescribed online training at First Transit University Skillport's website?	X		
1. Has the manager completed the required 7 hours of prescribed online training for Silver award shops at First Transit University Skillport's website?		X	
1. Has the manager completed the required 8 hours of prescribed online training for Gold award shops at First Transit University Skillport's website?			X
ASE Certifications			
1. Do 50% percent of technicians have at least one ASE certification?	X		
1. Do 100% percent of technicians have at least ASE Brake certification for applicable fleet?		X	
1. Are all technicians are ASE certified and is the shop blue seal certified?			X
2. Are technicians who do not have any ASE certifications actively enrolled in Delmar Learning ASE preparation program?	X	X	
2. Are technicians who have one or no ASE certifications actively enrolled in Delmar Learning ASE preparation program?			X
Performance Reviews			
1. Are all technician performance reviews are done on time?	X		
1. Are all technician performance reviews are done on time and provide a development plan signed by the technician and maintenance manager?		X	X

Criteria/ Requirements	Bronze	Silver	Gold
Availability – Reliability – Cleanliness			
1. Are miles between road calls above contractual requirement or above baseline established by maintenance manager and regional director of maintenance?	X	X	X
2. Is the 90 day mechanical missed trip average better than the 12 month average?	X	X	X
3. Is the cleanliness score above 70%?	X		
3. Is the cleanliness score above 80%?		X	
3. Is the cleanliness score above 90%?			X
LTI/All Accidents/Safety			
1. LTI free past 6 months	X		
1. LTI free past 12 months		X	X
2. Accident free past 6 months	X		
2. Accident free past 12 months		X	X
3. Passing grades on DOT, State or local terminal inspections	X	X	X

J.P.Morgan

JPMorgan Chase Bank, N.A.
383 Madison Avenue
New York, New York 10179

January 04, 2019

First Transit, Inc.
600 Vine Street
Suite 1400
Cincinnati, OH 45202

Ms. Cahall:

We, JPMorgan Chase Bank, N.A. (the "**Bank**"), are writing to you at the request of First Transit, Inc. (the "**Company**"), an affiliate of FirstGroup PLC ("**FirstGroup**"), which has requested that the Bank provide you with a letter summarizing our banking relationship with the Company.

We are pleased to confirm that as of the date hereof i) FirstGroup has maintained a DDA with the Bank for over 18 years, ii) FirstGroup maintains a low eight-figure balance, iii) the Bank extends credit to FirstGroup, and iv) our dealings and experience with the Company have been conducted in a satisfactory manner.

We trust that the above information is sufficient for your purposes.

The information in this letter is provided as an accommodation to your inquiry. This letter and any information provided herewith are furnished on the condition that they are strictly confidential, that no liability or responsibility whatsoever in connection herewith shall attach to the Bank or any of its affiliates or its or their respective officers, employees or agents, and that this letter makes no representations regarding the general condition of the Company, FirstGroup, their respective management, or their future ability to meet their respective obligations. Any information provided is subject to change without notice.

Very truly yours,

JPMORGAN CHASE BANK, N.A.

By 
Name: Eddie Sassoon
Title: Executive Director



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Rolling Meadows, IL 60008-4050 | USA
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630.773.3800
www.ajg.com

May 1, 2019

**City of Monterey Park
320 W. Newmark Ave.
Monterey Park, CA 91754**

**Re: First Transit, Inc.
Provide Local Fixed Route Transportation Services**

To Whom It May Concern:

It has been the privilege of Travelers Casualty and Surety Company of America to provide surety bonds for First Transit, Inc. for over ten years. During that time they have performed and we have bonded projects in the \$10,000,000 range for a wide variety of owners.

It is our opinion that First Transit, Inc. is qualified to perform the above captioned project. At their request we will give favorable consideration to providing an annual performance bond in the amount of \$100,000.

Please note that the decision to issue the performance bond is a matter between First Transit, Inc. and Travelers, and will be subject to our standard underwriting at the time of the final bond request, which will include but not be limited to the acceptability of the contract documents, bond forms and financing. We assume no liability to third parties or to you if for any reason we do not execute said bonds.

Travelers Casualty and Surety Company has an AM Best rating of A++ XV, and a Treasury Listing in excess of \$100 million dollars. Travelers Casualty and Surety Company is licensed to do business in the State of California.

If you have any questions or need any additional information, please do not hesitate to contact me.

Sincerely,

Travelers Casualty and Surety Company of America

Jon A. Schroeder
Attorney-In-Fact



Travelers Casualty and Surety Company of America
Travelers Casualty and Surety Company
St. Paul Fire and Marine Insurance Company

POWER OF ATTORNEY

KNOW ALL MEN BY THESE PRESENTS: That Travelers Casualty and Surety Company of America, Travelers Casualty and Surety Company, and St. Paul Fire and Marine Insurance Company are corporations duly organized under the laws of the State of Connecticut (herein collectively called the "Companies"), and that the Companies do hereby make, constitute and appoint Jon A. Schroeder of Rolling Meadows, Illinois, their true and lawful Attorney-in-Fact to sign, execute, seal and acknowledge any and all bonds, recognizances, conditional undertakings and other writings obligatory in the nature thereof on behalf of the Companies in their business of guaranteeing the fidelity of persons, guaranteeing the performance of contracts and executing or guaranteeing bonds and undertakings required or permitted in any actions or proceedings allowed by law.

IN WITNESS WHEREOF, the Companies have caused this instrument to be signed, and their corporate seals to be hereto affixed, this 3rd day of February, 2017.



State of Connecticut

City of Hartford ss.

By: _____

Robert L. Raney, Senior Vice President

On this the 3rd day of February, 2017, before me personally appeared Robert L. Raney, who acknowledged himself to be the Senior Vice President of Travelers Casualty and Surety Company of America, Travelers Casualty and Surety Company, and St. Paul Fire and Marine Insurance Company, and that he, as such, being authorized so to do, executed the foregoing instrument for the purposes therein contained by signing on behalf of the corporations by himself as a duly authorized officer.

In Witness Whereof, I hereunto set my hand and official seal.

My Commission expires the 30th day of June, 2021



Marie C. Tetreault
Marie C. Tetreault, Notary Public

This Power of Attorney is granted under and by the authority of the following resolutions adopted by the Boards of Directors of Travelers Casualty and Surety Company of America, Travelers Casualty and Surety Company, and St. Paul Fire and Marine Insurance Company, which resolutions are now in force and effect, reading as follows:

RESOLVED, that the Chairman, the President, any Vice Chairman, any Executive Vice President, any Senior Vice President, any Vice President, any Second Vice President, the Treasurer, any Assistant Treasurer, the Corporate Secretary or any Assistant Secretary may appoint Attorneys-in-Fact and Agents to act for and on behalf of the Company and may give such appointee such authority as his or her certificate of authority may prescribe to sign with the Company's name and seal with the Company's seal by a Secretary or Assistant Secretary; and other writings obligatory in the nature of a bond, recognizance, or conditional undertaking, and any of said officers or the Board of Directors at any time may remove any such appointee and revoke the power given him or her; and it is

FURTHER RESOLVED, that the Chairman, the President, any Vice Chairman, any Executive Vice President, any Senior Vice President or any Vice President may delegate all or any part of the foregoing authority to one or more officers or employees of this Company, provided that each such delegation is in writing and a copy thereof is filed in the office of the Secretary; and it is

FURTHER RESOLVED, that any bond, recognizance, contract of indemnity, or writing obligatory in the nature of a bond, recognizance, or conditional undertaking shall be valid and binding upon the Company when (a) signed by the President, any Vice Chairman, any Executive Vice President, any Senior Vice President or any Vice President, any Second Vice President, the Treasurer, any Assistant Treasurer, the Corporate Secretary or any Assistant Secretary and duly attested and sealed with the Company's seal by a Secretary or Assistant Secretary; or (b) duly executed (under seal, if required) by one or more Attorneys-in-Fact and Agents pursuant to the power prescribed in his or her certificate or their certificates of authority or by one or more Company officers pursuant to a written delegation of authority; and it is

FURTHER RESOLVED, that the signature of each of the following officers: President, any Executive Vice President, any Senior Vice President, any Vice President, any Assistant Vice President, any Secretary, any Assistant Secretary, and the seal of the Company may be affixed by facsimile to any Power of Attorney or to any certificate relating thereto appointing Resident Vice Presidents, Resident Assistant Secretaries or Attorneys-in-Fact for purposes only of executing and attesting bonds and undertakings and other writings obligatory in the nature thereof, and any such Power of Attorney or certificate bearing such facsimile signature or facsimile seal shall be valid and binding upon the Company and any such power so executed and certified by such facsimile signature and facsimile seal shall be valid and binding on the Company in the future with respect to any bond or understanding to which it is attached.

I, Kevin E. Hughes, the undersigned, Assistant Secretary of Travelers Casualty and Surety Company of America, Travelers Casualty and Surety Company, and St. Paul Fire and Marine Insurance Company, do hereby certify that the above and foregoing is a true and correct copy of the Power of Attorney executed by said Companies, which remains in full force and effect.

Dated this 1st day of May, 2019



Kevin E. Hughes
Kevin E. Hughes, Assistant Secretary

To verify the authenticity of this Power of Attorney, please call us at 1-800-421-3880.
Please refer to the above-named Attorney-in-Fact and the details of the bond to which the power is attached.

PERFORMANCE BOND

Annual Form

Bond No. _____

NOW ALL BY THESE PRESENTS, That we _____, as Principal, and _____, of _____, authorized to do business in the State of _____, as Surety, are held and firmly bound unto _____, as Obligor, in the maximum penal sum of _____ Dollars (_____), lawful money of the United States of America, for which payment well and truly to be made we bind ourselves, our heirs, executors and assigns, jointly and severally, firmly by this Bond.

WHEREAS, the Principal has entered, or is about to enter, into a written agreement with the Obligor to perform in accordance with the terms and conditions of the _____, (hereinafter referred to as the Contract), said Contract is hereby referred to and made a part hereof;

NOW, THEREFORE, the condition of this obligation is such that if the above named Principal, its successors and assigns, shall well and truly perform its obligations as set forth in the above mentioned Contract, then this Bond shall be void; otherwise to remain in full force and effect pursuant to its terms.

Notwithstanding anything to the contrary in the Contract, the Bond is subject to the following express conditions:

1. Whereas, the Obligor has agreed to accept this Bond, this Bond shall be effective for the definite period of _____ to _____. The Bond may be extended, at the sole option of the Surety, by continuation certificate for additional periods from the expiry date hereof. However, neither: (a) the Surety's decision not to issue a continuation certificate, nor (b) the failure or inability of the Principal to file a replacement bond or other security in the event the Surety exercises its right to not renew this Bond, shall itself constitute a loss to the Obligor recoverable under this Bond or any extension thereof.
2. The above referenced Contract has a term ending _____. Regardless of the number of years this Bond is in force or the number of continuation certificates issued, this Bond shall not be extended beyond _____, unless earlier nonrenewed pursuant to paragraph 1 above.
3. No claim, action, suit or proceeding, except as hereinafter set forth, shall be had or maintained against the Surety on this instrument unless such claim, action, suit or proceeding is brought or instituted upon the Surety within one year from termination or expiration of the bond term.
4. Regardless of the number of years this Bond is in force or the number of continuation certificates issued, the liability of the Surety shall not be cumulative in amounts from period to period and shall in no event exceed the amount set forth above, or as amended by rider.
5. Any notice, demand, certification or request for payment, made under this Bond shall be made in writing to the Surety at the address specified below. Any demand or request for payment must be made prior to the expiry date of this Bond.

Surety Address: _____

Attn: **Bond Claim**

6. If any conflict or inconsistency exists between the Surety's obligations or undertakings as described in this Bond and as described in the underlying Contract, then the terms of this Bond shall prevail.

SIGNED, SEALED AND DATED this _____ day of _____, _____.

By: _____, Principal

By: _____, Attorney-in-Fact

ATTACHMENT 3

Transportation Concepts Cost Proposal



**Proposal to the
City of Monterey Park
For the Operation and Maintenance
of the**



Fixed-Route Bus Service



Submitted by:

TC

TRANSPORTATION CONCEPTS

**12 Mauchly Building I
Irvine, California 92618**

ORIGINAL

April 30, 2019

Mark McAvoy
Director of Public Works
City of Monterey Park
320 W. Newmark Ave
Monterey Park, CA 91754

Dear Mr. McAvoy:

On behalf of Transportation Concepts (TC), I would like to thank you for the opportunity to submit a proposal for the operation and maintenance of the Monterey Park Spirit fixed route bus service.

Transportation Concepts is a California Company based in Irvine, California who has successfully operated fixed route bus services throughout the local area for over thirty five years.

We hope that through our proposal we are able to demonstrate our dedication and commitment to the City of Monterey Park, the highlights of our company, and, our offer to operate this very important service to include:

- A highly qualified and dedicated proposed Project Manager with profound knowledge of Fixed Route Services compiled with a local support team of professionals, including our Director of Operations and a Regional Area Manager to lend the necessary support this important Transit Operation deserves
- A commitment to purchase and dedicated a 2019 CNG Starcraft Allstar XL 32" transit bus as a spare to the existing fleet
- Furthermore a commitment to procure and install a the REI Buswatch Camera system in City Transit vehicle as well as the purchase and installation an Annunciator system along with the Hanover LED signs so that the entire Monterey Park Spirit fleet will have the same front and rear LED signage, will provide a unified Annunciator system and will have Next bus technically so that users within the community to identify exactly where the Monterey Spirit equipment is on route at an time and allow real-time accessibility for on time performance along each and every bus stop
- A highly qualified corporate support staff based in Irvine, California
- An operational plan that focuses on customer service resulting in a positive experience for the end user
- A partnership with Penske to insure that the City fleet is treated with the "best of the best" in maintenance repairs so that those City assets will not only be become more reliable on the street, they will have their life expectancy increased due to that time of the line maintenance care

- The facility will be Montebello, which is only a few miles away from the City of Monterey Park which again increasing fleet life expectancy with less traveled miles as well as the immediate response that the Transportation Concepts team will be able to deliver.
- TC has a proven operational approach and support system that will be echoed by each and every Client Reference contacted

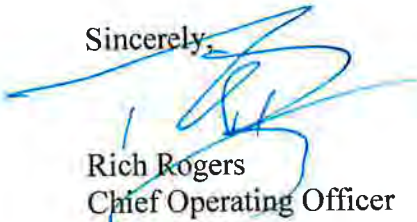
Transportation Concepts builds a culture of "total commitment" service that will be evident to your passengers. We pride ourselves in a solid support structure and the commitment we make to our employees and customers. This commitment is apparent in our performance. We are the ONLY Company of this size with the described level of experience in the industry.

Additionally, not only will Brett Baum, our Director of Operations have overall responsibility for the success of our dedicated Project Manager for the Monterey Park Spirit service, Brian Connell, our Area Regional who actually resides in Montebello and served as a successful Project Manager of the Monterey Park Spirit service will assist Mr. Baum.

Transportation Concepts is experienced in providing seamless contract transitions and had a successful operational past with the City of Monterey Park, through the provision of previously operating the Spirit bus service. All of these items will enhance a successful and smooth transition to a local contractor that really cares about each and every operation.. We are confident that we have submitted a very sound and competitive proposal, which is valid for a minimum of 90 days from date of opening. We truly look forward to the opportunity to possibly work with the City of Monterey Park will make a positive difference in your communities vital transportation service program.

If further information is needed, please contact me at 949 864-3493 or via e-mail – rrogers@transportation-concepts.com. I am the contact person during the evaluation period and I am authorized to bind Transportation Concepts to the terms of this proposal. Transportation Concepts employees take pride in their jobs and will work harder to serve your customers. We are confident that our approach will facilitate better performance results than any of our competitors.

Sincerely,



Rich Rogers
Chief Operating Officer

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A. COST PROPOSAL FORM

Please reference the required cost proposal forms in this section for the operation and maintenance of the City of Monterey Park Local Fixed-Route System.

Proposal –Operation and Maintenance of the Spirit Bus Service



ATTACHMENT B
CITY OF MONTEREY PARK
COST PROPOSAL SPREADSHEET

This Form Identifies the key cost components for the operation of the Fixed Route transit service. This cost information will be used in the evaluation of proposals. On an attached sheet of paper, please indicate back-up calculations made in preparing all component costs

CHARTER REVENUE VEHICLE SERVICE HOURLY RATE (Total estimated annual hours – 200 hours)				\$ 56.00 per hour	
	FY 2019 - 2020	FY 2020 - 2021	FY 2021 - 2022	FY 2022 - 2023	
HOURLY RATE COMPONENTS	YEAR 1	YEAR 2	YEAR 3	YEAR 4	
1. Operating Costs - Driver Wages	\$ 314,514	\$ 326,416	\$ 338,214	\$ 350,012	
2. Maintenance Labor Costs	\$ 73,174	\$ 75,369	\$ 77,630	\$ 79,959	
3. Administrative Costs	\$ 77,280	\$ 79,599	\$ 79,441	\$ 81,824	
4. Maintenance/Operating Facilities	\$ 157,677	\$ 162,297	\$ 171,714	\$ 176,743	
5. Vehicle Insurance	\$ 44,362	\$ 44,577	\$ 45,915	\$ 47,292	
6. City and Other Fees/Taxes - Regional and Corporate Overhead	\$ 43,695	\$ 45,315	\$ 46,890	\$ 48,375	
7. Capital Costs- Back up Vehicle, Camera system and Annunciator system for fleet	\$ 24,794	\$ 24,791	\$ 24,882	\$ 24,845	
8. Start-Up Costs	\$ 11,227	\$ 1,123	\$ 1,157	\$ 1,192	
9. Profit	\$ 38,832	\$ 35,188	\$ 36,421	\$ 43,247	
10. Other Costs- Payroll Benefits and work comp Insurance	\$ 185,246	\$ 210,660	\$ 218,325	\$ 227,691	
11. Total Costs (Sum of Lines 1-10)	\$ 970,801	\$ 1,005,336	\$ 1,040,588	\$ 1,081,180	
12. Vehicle Revenue Hours	\$ 19,000	\$ 19,000	\$ 19,000	\$ 19,000	
13. Hourly Rate (Line 11 divided by Line 12)	\$ 51.09	\$ 52.91	\$ 54.77	\$ 56.90	

Monterey Park Spirit
Cost Breakdown
Explanation

Transportation Concepts Price Explanation

Monterey Park Sp

INCOME STATEMENT	Year 1	Year 2	Year 3	Year 4
Driver Wages	314,514	326,416	338,214	350,012
Fuel Cost	-	-	-	-
Insurance Costs	44,362	44,577	45,915	47,292
Operating Depreciation	23,328	23,328	23,328	23,244
Operating Expenses	11,227	1,123	1,157	1,192
Maintenance Wages	73,174	75,369	77,630	79,959
Maintenance Costs	112,677	115,947	121,426	124,947
DDS Costs	1,466	1,510	1,554	1,601
Total Direct Expenses	580,748	588,270	609,223	628,247
Contribution Margin	390,053	417,066	431,365	452,933
Facility Cost	45,000	46,350	47,741	49,173
Operations Wages	29,120	29,994	30,894	31,821
DDS Wages	-	-	-	-
Administrative Wages	45,760	47,133	48,547	50,003
Payroll Based Expenses	185,246	210,660	218,325	227,691
Administrative Expenses	2,400	2,472	2,547	2,623
Regional/District Overhead	29,130	30,180	31,260	32,250
Total Indirect Expenses	336,656	366,789	379,314	393,561
Operating IBIT	53,397	50,277	52,051	59,372
Corporate Overhead	14,565	15,090	15,630	16,125
Company Taxes and Profit	38,832	35,187	36,421	43,247
Total Expenses	970,801	1,005,336	1,040,588	1,081,180
Vehicle Service Hours	19,000	19,000	19,000	19,000
Hourly Rate	\$ 51.10	\$ 52.91	\$ 54.77	\$ 56.90

ATTACHMENT D

CITY OF MONTEREY PARK

PROPOSED STAFFING

Position Type from RFP	Contractor Position Title	Full Time # of Persons	Part Time # of Persons	FTE Hours (2080)	Average FT Annual Salary	FT % Benefits	Average PT Hourly Rate	PT % Benefits
General Manager	DOO	0	1	520	\$0	0.00%		
Operations Manager	Ops Mgr	1	0	2080	\$45,760	100.00%		
Maintenance Manager	Maint Super	1	0	2080	\$47,840	100.00%		
Safety and Training Manager	Trainer	0	1	520	\$0	0.00%		
Road Supervisor	Road super	1	0	2080	\$29,120	100.00%	\$0	0.00%
Dispatcher		0	1	520	0	0.00	\$0	0.00%
Bus Operator	Bus Drivers	10	1	21,518	\$27,872	100.00%	\$0	0.00%
Other (Specify)					\$0	0.00%	\$0	0.00%
Other (Specify)					\$0	0.00%	\$0	0.00%
Maintenance Manager/Supervisor					\$0	0.00%	\$0	0.00%
Mechanics					\$0	0.00%	\$0	0.00%
Mechanic/Technician					\$0	0.00%	\$0	0.00%
Service Worker/Fueler	Utility	1	0	2080	\$25,334	100.00%	\$0	0.00%
Maintenance Clerk					\$0	0.00%	\$0	0.00%
Other (Specify)					\$0	0.00%	\$0	0.00%
Other (Specify)					\$0	0.00%	\$0	0.00%
Transit Analyst					\$0	0.00%	\$0	0.00%
Customer Service					\$0	0.00%	\$0	0.00%
Administrative Assistant/Clerk					\$0	0.00%	\$0	0.00%
Other (Specify)					\$0	0.00%	\$0	0.00%
Other (Specify)					\$0	0.00%	\$0	0.00%

B. REQUIRED FORMS

Included in this section is the completed company information form as well as the proposal submittal checklist form required by the City of Monterey Park for this proposal

CHECKLIST OF REQUIRED PROPOSAL MATERIALS

- ☒ Cover Sheet
- ☒ Letter of Transmittal
- ☒ 1 original and 3 bound copies of proposal (clearly marked as required)
- ☒ Acknowledgement of Addenda, if any
- ☒ Statement that proposal is binding for 120 days from due date
- ☒ Proof of Registry (good standing) with California Secretary of State
- ☒ Proof of Participation – California DMV Pull Notice Program
- ☒ Proof of CHP Certification
- ☒ Project Understanding
- ☒ Experience and References
- ☒ Start-Up Plan
 - ☒ Implementation Schedule
 - ☒ Facilities Location
- ☒ Administration Plan
- ☒ Operations Plan
- ☒ Maintenance Plan
- ☒ Insurance Adequacy
 - ☒ Wavier of Subrogation/signed endorsement
 - ☒ Signed endorsement for Primary Insurance
 - ☒ City listed as additional insured on all policies
- ☒ Financial Information
- ☒ Price Proposal Spreadsheet (Provide an electronic version of the Cost Proposal in Excel)
- ☒ N/A Exceptions to draft contract, if any

ATTACHMENT A

CITY OF MONTEREY PARK

INSURANCE REQUIREMENTS
[MUST BE SUBMITTED WITH PROJECT PROPOSAL]

To be awarded this contract, the successful bidder must procure and maintain the following types of insurance with coverage limits complying, at a minimum, with the limits set forth below:

Type of Insurance	Limits
Commercial general liability:	\$20,000,000 (Twenty Million Dollars)
Professional liability:	\$1,000,000 (One Million Dollars)
Business automobile liability:	\$20,000,000 (Twenty Million Dollars)
Workers compensation:	Statutory requirement

Commercial general liability insurance must meet or exceed the requirements of the most current ISO-CGL Form. The amount of insurance set forth above must be a combined single limit per occurrence for bodily injury, personal injury, and property damage for the policy coverage. Liability policies must be endorsed to name the City, its officials, and employees as "additional insureds" under said insurance coverage and to state that such insurance will be deemed "primary" such that any other insurance that may be carried by the City will be excess thereto. Such insurance must be on an "occurrence," not a "claims made," basis and will not be cancelable or subject to reduction except upon thirty (30) days prior written notice to the City.

Professional liability coverage must be on an "occurrence basis" if such coverage is available, or on a "claims made" basis if not available. When coverage is provided on a "claims made basis," the Consultant must continue to maintain the insurance in effect for a period of three (3) years after this Agreement expires or is terminated ("extended insurance"). Such extended insurance must have the same coverage and limits as the policy that was in effect during the term of this Agreement, and cover the Consultant for all claims made by the City arising out of any errors or omissions of the Consultant, or its officers, employees or agents during the time this Agreement was in effect. Automobile coverage must be written on ISO Business Auto Coverage Form CA 00 01 06 92, including symbol 1 (Any Auto).

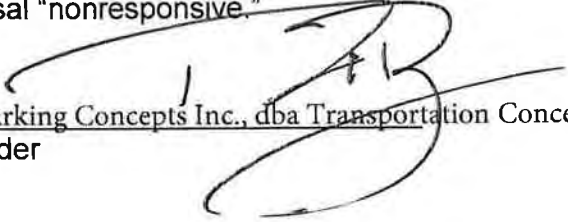
Excess or Umbrella Liability Insurance (Over Primary) if used to meet limit requirements, must provide coverage at least as broad as specified for the underlying coverage. Any such coverage provided under an umbrella liability policy must include a drop down

provision providing primary coverage above a maximum \$25,000 self-insured retention for liability not covered by primary but covered by the umbrella. Coverage must be provided on a "pay on behalf" basis, with defense costs payable in addition to policy limits. Policy must contain a provision obligating insurer at the time insured's liability exclusion precluding coverage for claims or suits by one insured against another. Coverage must be applicable to City for injury employees of Contractor, subcontractors or others involved in the work. The scope of coverage provided is subject to approval of City following receipt of proof of insurance as required herein. Limits are subject to review but in no event less than \$20,000,000 per occurrence.

The Consultant must furnish to the City duly authenticated Certificates of Insurance evidencing maintenance of the insurance required under this Agreement, endorsements as required herein, and such other evidence of insurance or copies of policies as may be reasonably required by the City from time to time. Insurance must be placed with admitted insurers with a current A.M. Best Company Rating equivalent to at least a Rating of "A:VII." Certificate(s) must reflect that the insurer will provide thirty (30) day notice of any cancellation of coverage. The Consultant will require its insurer to modify such certificates to delete any exculpatory wording stating that failure of the insurer to mail written notice of cancellation imposes no obligation, and to delete the word "endeavor" with regard to any notice provisions.

By signing this form, the bidder certifies that it has read, understands, and will comply with these insurance requirements if it is selected as the City's consultant. Failure to provide this insurance will render the bidder's proposal "nonresponsive."

May 1, 2019
Date


Parking Concepts Inc., dba Transportation Concepts
Bidder

FORM A
SUBMITTAL COVER PAGE

**City of Monterey Park Fixed Route Transit
Services**

Bidder's Company Name Parking Concepts Inc., dba Transportation Concepts
Legal Structure (corp./partner/proprietor) Corporation
Principal Office Address 12 Mauchly, Building I
City, St, Zip Irvine, CA 92618
Federal Employer Identification Number 95-2909899

I certify that this Proposer is sufficiently informed as to all matters affecting the performance of the work, and the furnishing of labor, supplies, material or equipment called for in this proposal; that the proposal has been checked for errors and omissions; and that the facts stated in the proposal are current and as intended and are a complete and correct statement of the facts stated therein for performing the work or furnishing the labor, supplies, materials or equipment required by the RFP. This Proposer waives any claim for the return of its proposal on account of errors or omissions claimed to have been made in its proposal or for any other reason.

I certify that this response fully complies with the requirements as defined in the RFP, and that I am an authorized representative of the company to bind the firm to this response to the RFP for a 120-day period.

I certify that this Proposer is NOT on the U.S. Comptroller General's list of ineligible firms for federally financed and assisted construction, materials, equipment contracts or services.

Name of Authorized Representative Rich Rogers

Title Chief Operating Officer

Signature of Authorized Representative 

Date April 30, 2019

FORM B
PROPOSER CONTACT INFORMATION

Proposer

Firm Name: Parking Concepts Inc., dba Transportation Concepts
Authorized Representative Name: Rich Rogers
Authorized Representative Title: Chief Operating Officer
Telephone Number: 949 864-3493
Email Address: rrogers@transportation-concepts.com

Secondary Contact Name: Gill Barnett
Secondary Contact Title: President
Telephone Number: 949 753-7525
Email Address: gbarnett@pcioc.com

Subcontractors to Proposer

Firm Name: Not Applicable
Address: _____
City, State, Zip _____
Authorized Representative Name: _____
Authorized Representative Title: _____
Telephone Number: _____
Email Address: _____
Work to be performed: _____
Is firm a qualified DBE? ☐ No ☐ Yes, Qualifying Agency: _____
Annual dollar value of participation: \$ _____

Firm Name: _____
Address: _____
City, State, Zip _____
Authorized Representative Name: _____
Authorized Representative Title: _____
Telephone Number: _____
Email Address: _____
Work to be performed: _____
Is firm a qualified DBE? ☐ No ☐ Yes, Qualifying Agency: _____
Annual dollar value of participation: \$ _____

Attach additional pages as necessary.

FORM C
ADDENDA ACKNOWLEDGEMENT

City of Monterey Park Local Transit Services
Fixed route

CONTRACTOR NAME: Parking Concepts Inc., dba Transportation Concepts

CONTRACTOR hereby acknowledges that it has received and read the following

Addenda:

Addendum # 1	Signature 
Addendum #	Signature 
Addendum #	Signature _____
Addendum #	Signature _____
Addendum #	Signature _____

FORM D
NON-COLLUSION AFFIDAVIT FOR CONTRACTOR

STATE OF CALIFORNIA COUNTY OF LOS ANGELES

Rich Rogers (Name) declares and
says:

1. That he/she is the (owner, partner, representative, or agent) of Parking Concepts Inc., dba Transportation Concepts (Contractor Name), hereinafter referred to as (CONTRACTOR) or (subcontractor).
2. That he/she is fully informed regarding the preparation and contents of this proposal for certain work in the City of Monterey Park, State of California.
3. That his/her proposal is genuine and is not collusive or a sham proposal.
4. That any of its officers, owners, agents, representatives, employees, or parties in interest, including this affiliate, has not in any way colluded, conspired, connived or agreed, directly or indirectly, with any other CONTRACTOR, firm, or person to submit a collusive or sham proposal in connection with such contract, or to refrain to submitting a proposal in connection with such contract, or has in any manner, directly or indirectly, sought by unlawful agreement or connivance with any other CONTRACTOR, firm, or person to fix the price or prices in said proposal, or to secure through collusion, conspiracy, connivance, or unlawful agreement any advantage against City, or any person interested in the proposed contract; and,
5. That the price or prices quoted in the proposal are fair and proper, and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the CONTRACTOR, or any of its agents, owners, representatives, employees, or parties in interest, including this affiliate.

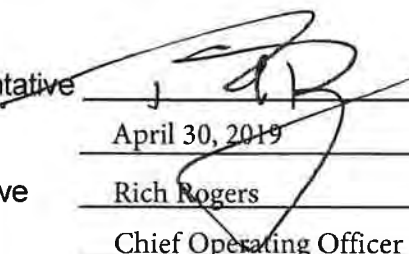
I certify (or declare) under penalty of perjury, that the foregoing is true and correct.

Signature of Authorized Representative

Date

Name of Authorized Representative

Title



April 30, 2019

Rich Rogers

Chief Operating Officer

FORM E
**CERTIFICATION OF PRIMARY PARTICIPANT REGARDING DEBARMENT,
SUSPENSION, AND OTHER RESPONSIBILITY MATTERS**

The Primary Participant Parking Concepts Inc., dba Transportation Concepts (Name of CONTRACTOR) certified to the best of its knowledge and belief, that it and its principals:

- a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
- b. Have not, within a five year period preceding this proposal, been convicted, or had a civil judgment rendered against them for commission of fraud, or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes, or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false Statements, or receiving stolen property;
- c. Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and
- d. Have not within a five year period preceding this proposal had one or more public transactions (Federal, State or local) terminated for default.

If the primary participant is unable to certify to any of the Statements in this certification, the participant must attach an explanation to this certification.

THE PRIMARY PARTICIPANT, Parking Concepts Inc., dba Transportation Concepts (Name of CONTRACTOR) CERTIFIES OR AFFIRMS THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISIONS OF 31 USC SECTIONS 3801 ET SEQUA ARE APPLICABLE THERETO.

Signature of Authorized Representative _____

Date _____

Name of Authorized Representative _____

Title _____

April 30, 2019

Rich Rogers

Chief Operating Officer

The undersigned chief legal counsel (or corporate secretary) for the hereby certifies that the authorized Representative above has authority under State and local law to comply with the subject assurances and that the certification above has been legally made.

Signature of Attorney/Secretary _____

Date _____

May 1, 2019



**CITY OF MONTEREY PARK
CALIFORNIA**

ADDENDUM NO. 1

**REQUEST FOR PROPOSAL (RFP)
TO PROVIDE LOCAL FIXED ROUTE TRANSPORTATION SERVICES**

April 19, 2019

This Addendum provides changes to the RFP and responses/clarifications to questions submitted by bidders.

ALL OTHER PORTIONS OF RFP SHALL REMAIN IN FULL FORCE AND EFFECT.

For further Information please contact Bonnie Tam at (626) 307-1383.

Please include a signed copy of this Addendum with your bid. Failure to do so will result in an invalid proposal.

Company: PARKING CONCEPTS INC. dba TRANSPORTATION CONCEPTS

Signature

Date

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

REGISTRATION CERTIFICATE TO OPERATE AS A PRIVATE CARRIER OF PASSENGER
UNDER SECTION 4005 OF THE PUBLIC UTILITIES CODE

FILE NO. CA 043399

PARKING CONCEPTS INC
RICH ROGERS
12 MAUCHLY BUILDING I
IRVINE CA 92618 -

The above-named Private Carrier, having made written application to the Public Utilities Commission of the State of California to register its operation as a PRIVATE CARRIER pursuant to the Private Carriers of Passengers' Registration Act (Sections 4000 through 4022 of the Public Utilities Code), and having complied with said code, is granted this certificate of registration authorizing the operation of vehicles as defined in Section 4001 of the Public Utilities Code and Sections 408 and 34500 of the Vehicle Code (defined vehicles), over the public highways of the State of California, subject to the following conditions:

- (1) No defined vehicle or vehicles shall be operated by said private carrier unless adequately covered by a public liability and property damage insurance policy as required by Section 4010 of the Public Utilities Code and the Commission's General Order No. 160 series.
- (2) All defined vehicles operated pursuant to this registration shall display the carrier identification number (CA number) as required by Section 4015 of the Public Utilities Code and 34507.5 of the Vehicle Code.
- (3) This registration certificate is subject to suspension or cancellation as provided by Sections 4010 and 4022 of the Public Utilities Code.
- (4) If said Private Carrier's business type changes, for example from a proprietorship to a corporation, said Private Carrier must re-register its operations with this Commission.
- (5) An annual renewal fee of Thirty Dollars (\$30.00) for private carriers transporting passengers shall be paid to this Commission upon receipt of the annual renewal fee invoice.
- (6) Said Private Carrier shall comply with all Commission orders, rules, directions and requirements governing transportation operations under the Private Carriers of Passengers' Registration Act including the Commission's General Order No. 160 series.

Dated this 10 day of FEBRUARY , 2003 .

Consumer Protection and Safety Division
License Section - Private Carrier Unit

C. IMPLEMENTATION SCHEDULE

Transportation Concepts (TC) realizes that a smooth transition to a new contractor is critical to the overall success of the operation. It is our chance to make an outstanding “first impression”. We take this very seriously as this will set the tone for public perception which not only reflects on TC but on the City of Monterey Park as well. This is a tremendous responsibility and our approach to transition is one of dedication and commitment to ensure that the outlined service will start up on a positive note with the operations service provider that continues throughout the term of the contract. We realize this may be a sensitive issue for employees currently operating the service. Our intention is to be efficient yet empathetic to the situation and those involved.

TC operates several contracts that involved an initial transition from public to private operator, from competitor to TC, or new service altogether. In addition, the nature of this business requires the need to transition from day to day on many levels day to include: the addition of service, route revisions, new employees, implementation of new policies, new technology, or new contractual obligations, even traffic or weather conditions can facilitate the need for making a transition. TC believes the most important element of effectively carrying out a designated “transition” is open, clear, and consistent communication. If all of the people involved in implementing a transition along with all of the people who will be affected by the transition are informed and prepared to make the transition, we are guaranteed success.

This is where the strength of our people makes the difference. Our team brings extensive experience, professionalism, and commitment and a history of performance excellence in transitions similar to the Spirit Bus Services. We recognize that the City's services are unique with several distinctive characteristics. However, the City's operational requirements relative to the transit service are familiar to us as we have hands on experience in every application proposed for this service.

The RFP Q&A indicated a July 1st start up, and as such we will be prepared to begin service on Monday, July 1st, 2019. Conducting the vehicle transition/transfer on a Saturday night/Sunday day allows an easier transition, however we would be amenable to what ever the City prefers. We would like to hold a meeting with the City Staff immediately upon contract award. Our plan will be adjusted based on any schedule changes initiated by the City of Monterey Park. Since this is a short timeframe, we will need to hit the ground running. Additionally, the plan will be further tailored upon coordination with the City and First Transit, the current provider.

In an effort to facilitate the most positive service transition possible, Transportation Concepts is offering that Ernesto Lizarraga, our proposed Project Manager is available immediately upon contract award, as well as Mario Monterroza, our Maintenance Supervisor, in addition to Brian Connell, our Area Regional Manager, Steve-o Purchase, our Director of Maintenance and Mr. Brett Baum, our Director of Operations. This team will be supported by Rich Rogers, our COO.

This start up management team has had an impeccable record of successfully start ups over the years and we know from history the key is to start out with everyone "hitting the ground" as soon as possible to insure a seamless transition to the passengers we will serve.

Described below are the elements necessary for a smooth transition and implementation. The primary ingredient to a successful transition is the establishment of a respectful partnership between TC and the City of Monterey Park. This requires communication, working together as a team, final clarification of and negotiation of the contract, and establishing common goals. In order to ensure that we accomplish these things, we will assign various members of the local and support team duties and responsibilities required to ensure each identified milestone is met and all items necessary for contract transitions are carried out. A master plan will be distributed to our team and team members will be held accountable relative to their assignments.

Workforce

Through our existing operations in the Los Angeles County area and through our proposed team, we have a sound understanding of the service area, in addition to the nature of the service, the regulatory issues governing the service, and the relationship that must exist between the Contractor, the City of Monterey Park and the community we serve.

Transportation Concepts will offer to retain all of the existing employees of the prior contractor and if those employees would even want to consider having Teamsters 848 as their bargaining unit we would always be open to it. Our goal is to insure our employees are taken care of and although the majority of our operations are operated union free we would always listen to our employees as to which type of relationship to prefer. Either working directly with TC or working with a labor union, the goal is always the same. It is to do all we can to show our appreciation for the dedicated employees in every way we can.

Transportation Concepts has been through many of these types of transitions. We have a solid approach to hiring and retaining existing employees. We will coordinate with the City as to the appropriate method of outreach to the existing employees for informational purposes. We will set up a hotline in which existing employees can call in and leave a message as to any questions or concerns they may have. Someone on the transition team will return their call within 24 hours.

Transportation Concepts will begin orientation training classes as necessary to ensure 100% service provision on day one.

Our training approach will ensure that a sufficient number of Operators are trained and ready on our first day of service. This is the same philosophy to accommodate any turnover experienced during the term of the contract. Transportation Concepts has assumed an average of 20% turnover throughout the term of the contract.

Training Staff

The local start up team, led by Brett Baum, our Director of Operations will be responsible for the coordination of all training efforts during the transition phase and throughout the duration of the contract. Brett will work with both our District Safety Trainer as well as a Corporate level training manager. More importantly, Brett will ensure all safety and training elements are properly addressed and that the City is kept informed on a daily basis through the contract transition.

Administrative Duties

Administrative requirements such as the dissemination of operating materials, the development and maintenance of detailed employee files, creating and keeping an extensive library of training materials and setting up payroll are significant factors during the transition. All administrative functions will be handled locally under the direction of Brian Connell in conjunction with Ernesto Lizarraga and Brett Baum. Brett will work with their team to ensure the establishment of accounts, the establishment of petty cash funds, credit card accounts and payroll, the identification and implementation of the billing process, creation and maintenance of both employee files and training library, setting up the purchase of any capital and initiation of insurance coverage, any additional office supplies, coordination of cleaning process for system vehicles, fare collection and revenue procedures, and banking. Going forward this will be handled by Ernesto throughout the term of the contract.

Operational Items

Transportation Concepts is successful due to the ability to be flexible and effectively manage day to day operations. We are proposing a very hands-on, team oriented operational approach to this project. Due to the size of our company and our strategic approach to pursue opportunities that are a good fit for the organization, we will have the ability to give this project very personal attention from the top of the organization and beyond. This will be evident in the overall performance of the service and the impact on the community.

Maintenance Items

Steve-o Purchase and Mario Monterroza will coordinate all maintenance related issues with Penske Fleet Services during the transition phase to include equipment purchase, shop preparation for vehicle fleet, a formal plan relative to electronics and technology maintenance and safety protocols, Technician training, and coordination with the City of Monterey Park relative to transition inspections, vehicle files and the VMS.

Transportation Concepts truly believes in teamwork, among our employees and with the clients we serve. We approach contracting as a true partnership to provide the greatest good to the community. This philosophy will drive the entire process and greatly benefit the service in the long run. Our goal with the City of Monterey Park in this case is to assist in making the service transition as smooth as possible, focus on customer service, and of course operate the most productive service possible. In an ever-changing environment, there is always room for improvement, and we at TC will continuously strive for improvement that will result in a successful operation. Transportation Concepts

clearly understands the expectations of Monterey Park and currently has all personnel and operational expertise already in place to transition operators in a seamless manner upon signing a new contract.

It should be noted, that technical resources are also provided to the City at no additional cost through our corporate staff in the areas of consulting, system planning and analysis. TC is open to provide any additional assistance needed upon discussion. As part of our planning process, Transportation Concepts generally provides an operational audit after the first 90-120 days of service. At that time, we will meet with City Staff and discuss our findings. We are usually able to make suggestions relative to system efficiencies. Our policy is to work in partnership with Monterey Park to discuss potential changes initiated by TC or the City. Either way, our approach to implementation is to develop an action plan and communicate that action plan to anyone that will be affected by the change. Transportation Concepts has extensive experience working with our clients to implement service changes. We will demonstrate the same level of dedication and commitment to the City of Monterey Park

The Required Implementation form is included on the following page as well as our detailed timeline depicting key dates and events for Contract Transition and Start up of the Monterey Park Spirit Fixed Route Operation Service.

Key Dates & Events

May 4- City Council Approval - Notice to Proceed
 May 5 - Meet with City of Monterey Park
 May 5 - Meet with existing contract employees and Teamsters if desired
 May 6 - Meet with Penske, Set up meeting with existing employees
 May 5 - Provide material to existing employees; assure them that service needs to continue.
 May 6 - Meet with staff relative to setting up presentations within the community
 May 7 - Set up employee hotline for existing employees to call and get Co. information, start taking applications.
 May 8 - Order capital including radios and computers
 May 9 - Strategy meeting with team, Get human resource packages started,
 May 12 - Orientation meetings, reports set up, ensure all team members understand roles

May 13 - Begin recruiting process
 May 14 - Begin facility planning with Penske
 May 15 - Prepare for telephone set up and number transfer if needed
 May 16 - Get insurance process started
 May 16 - Order supplies and training materials
 May 15 - Begin interview process
 May 16 - Meet with City of Monterey Park to review progress
 May 19 - Order safety materials/start custom safety manual
 May 20 - Secure uniform vendor & agreement
 May 21 - Secure all required license and certifications, set up necessary accounts
 May 22 - Review applications
 May 23 - Set up interviews, set up process with clinic and back ground check co.
 May 23 - May 26 Interview current employees, start hiring process
 May 27 - May 30 Interview additional candidates if necessary
 May 28 - May 30 send employees for drug test and physicals
 May 30 - Meet with City of Monterey Park, confirm fueling process

Preparation

On the Move
 On the Move



May 31 - Offer employment to qualified employees, schedule last phase of hiring (screening)
 June 2 - Schedule training, order uniforms, vehicle inspections with Penske
 June 4 - Start Files/Confirm Insurance
 June 7 - Start training, ensure all shop tools and supplies
 June 8 - Check on equipment status; confirm Penske coordination process in place
 June 9 - Set up office cleaning schedules
 June 10 - Confirm maintenance coordination process with Penske/Operations
 June 11 - Ensure accounting procedures and payroll process is in place
 June 14 - Distribute TC employee welcome packets
 June 16 - Progress report to City/coordinate policies and procedures
 June 16 - Employee files in place
 June 17 - Confirm dispatch process
 June 18 - Confirm facility materials and supplies
 June 19 - Finalize customized safety manual
 June 20 - Vehicle inspection, Procedural manuals distributed, necessary notices posted
 June 21 - Final check on employees, Safety program materials ready to distribute
 June 22 - Ensure security procedures displayed
 June 23 - Meet with City of Monterey Park
 June 28 - Vehicle acceptance, finalize maintenance procedures
 June 28 - Ensure benefit packages are in place, complete training
 June 28 - Radio Installation, Computer Installation, confirm telephone service
 June 28 - Confirm driver assignments, Employee Rally/Kick off, confirm all systems in place
 June 29 - Ready for Start of Service

Proposal -Operation and Maintenance of the Spirit Bus Service



D. EXPERIENCE & QUALIFICATIONS



PARKING CONCEPTS INC.

Profile - Transportation Concepts is the public transportation division of Parking Concepts, a **California Corporation**, with corporate offices in Irvine, California. We currently employ over 1,500 people. Gill Barnett, President and owner of Parking Concepts, founded the company in 1974 in order to provide an enhanced level of **customer service** to an industry that had been sorely lacking in customer service. Today, Parking Concepts is one of the most successful and respected parking facility operators in the United States.

In 1982, Parking Concepts was awarded a shuttle bus contract at the Ontario International Airport. It was at that time that **Transportation Concepts** was formed. Transportation Concepts (TC) has been awarded and successfully operated and performed maintenance on the fleets of several fixed-route and dial-a-ride service contracts over the last 30 years. We are extremely proficient at providing high quality, high capacity, short haul, high frequency services. In addition, we provide other special services including regular shuttles connecting remote parking lots to employment centers; feeder services linking passengers from train stations to employment centers, and commuter services providing people transportation from designated parking lots in suburban areas to jobsites located in major metropolitan areas. These services are one way we can contribute to improving the air quality of the communities we serve. Transportation Concepts is intimately familiar with the service area, the type of equipment, and the technology anticipated to be utilized in this service. In fact, we were the Spirit Bus Service provider from 2001-2004. In addition, we are responsible for the operation and maintenance of similar type vehicles in several operations throughout Los Angeles County. We have worked hard to create a positive image and believe we have succeeded. Of course, our aim is to continuously improve, but the passengers we transport throughout our many operations are extremely pleased with the service we provide.



We are a relatively small company compared to some of the industry giants providing transit services throughout the United States. The majority of our business is currently concentrated in southern California. In fact, all region support is based in southern California. The supporting organization is made up of considerable strength in each of their specific disciplines. One of the advantages of our organizational structure is the availability of support staff.

Experience - From the start of our parking business in 1974, through the development of a separate transportation division in 1982 our company has enjoyed steady growth. Currently, we operate and manage several Fixed Route, Shuttle or Dial-a-Ride

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contracts. The company operates these services utilizing a fleet of over 100 vehicles ranging in size from seven passenger minivans to 40 foot transit coaches. The majority of the vehicles maintained and operated use clean burning fuels which we have experience operating since 1999.

Fixed-Route Services and Express Services:



Of course, we have hands on experience operating fixed-route service in similar areas. We have been responsible for the operation of regularly scheduled services throughout the state including overall management responsibilities encompassing day to day administration of systems operating in rural transit environments as well as major metropolitan areas transporting over 5 million passengers per year. This includes routing and scheduling, safety oversight, vehicle and facility maintenance, road supervision and dispatch oversight, integration of technology, and of course vehicle operations. Transportation Concepts employees have experience in this type of service since 1987.

Shuttle/Circulator/Feeder Services



Transportation Concepts has been providing shuttle services since 1982. Currently we operate several separate shuttle services of varying operating characteristics to include, campus shuttles, rail feeder shuttles, employer/employee shuttles and restaurant shuttles. We are extremely proficient at providing high quality, high capacity, short haul, high frequency services. In addition, we provide other special services including regular shuttles connecting remote parking lots to employment centers; feeder services linking passengers from light rail stations to employment centers, and commuter services providing people transportation from designated parking lots in suburban areas to jobsites located in major metropolitan areas.

ADA paratransit Services/Dial-a-Ride Services:

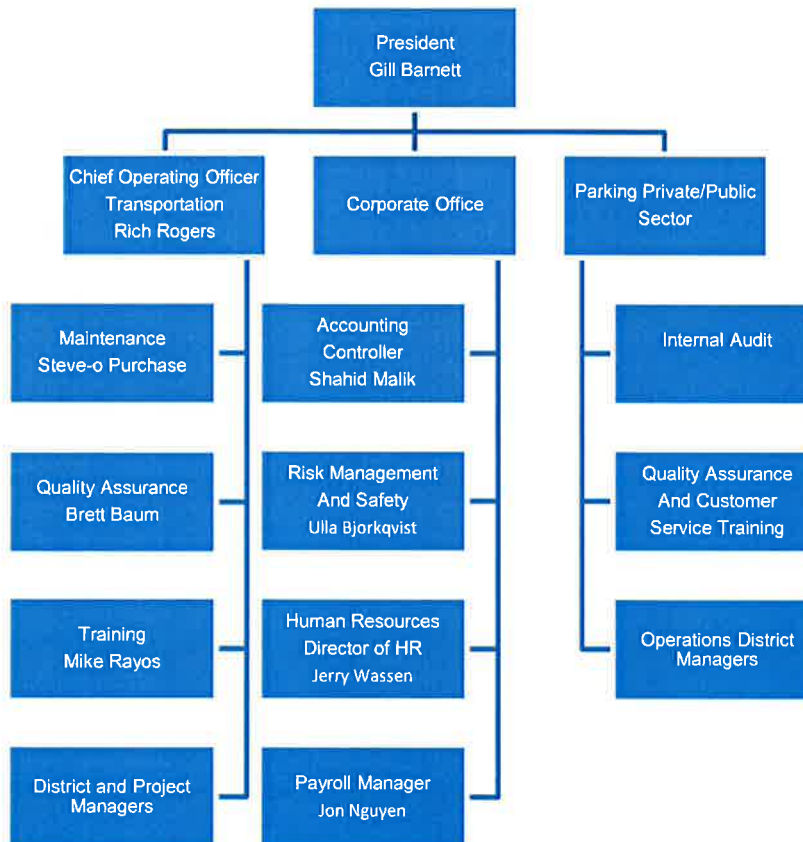


Our team also has experience providing dial-a-ride services as well as other ADA Paratransit with deviated fixed route services since 1985. This includes management, reservations, scheduling, dispatch, vehicle maintenance and operations. We have extensive experience in managing various size and types of such specialized services ranging from two to over one hundred vehicle operations carrying up to 1,000 passengers per day.

Corporate Support

Transportation Concepts offers a management approach that is specific to the needs of the City of Monterey Park Spirit bus services. Although it is extremely important to have reliable corporate support, the service is truly only as strong each and every manager on our team. We believe that our proposed manager Mr. Ernesto Lizarraga, as a key member of our management team, will enhance the Spirit bus service teams abilities and performance. Our Key Management team's qualifications are described below.

CORPORATE ORGANIZATIONAL CHART



Experience of Key Corporate Management Team



Gill Barnett, President – Gill Barnett, founder and owner of Parking Concepts and Transportation Concepts has been actively involved in the parking and transportation industry as a business owner for almost 40 years. He began his career as a parking attendant at the age of 17 and worked his way up to management by the age of 22. Noting the lack of quality customer care from the beginning of his career, Gill envisioned a company devoted to excellent **customer service** and in 1974 Parking Concepts was formed.

Proposal –Operation and Maintenance of the Spirit Bus Service





Rich Rogers, Chief Operating Officer - Transportation – Rich Rogers has been actively involved in the public transit industry for the past 30 years. Mr. Rogers is directly responsible for the oversight of all Transportation operations, and will insure that the highest level of quality service is provided to the City of Monterey Park. As the Chief Operating Officer, he will see to it that our operations meet company and contractual performance requirements such that safe, reliable and responsive service is consistently delivered. Mr. Rogers will be directly involved in any contract transition and negotiation and will have direct responsibility to work together with the City relative to contractual compliance and revisions as directed. Mr. Rogers will be instrumental in working with the Monterey Park Transportation staff, Brian Connell and ofcourse Marvin Williams in implementing potential service and contractual changes throughout the term of this contract.



Brett Baum, Director of Operations
Although Transportation Concepts offers extensive Corporate support, our experience in contract operations is that the overall quality of service is only as good as the local team. To this end, TC offers Mr. Brett Baum, an experienced and professional Manager with over 15 years of transit management to oversee the daily operations. He will have direct responsibility for this contract and serve as the direct liaison with County staff as well as our Program Manager. Mr. Baum's resume is included at the end of this section.



Steve Purchase, Regional Maintenance Director – Mr. Purchase has over 10 years of experience in maintenance management. He has hands on experience with similar fleets and clearly understands regulations relative to maintaining the City of Monterey Parks fleet. Mr. Purchase is in the process of becoming an ASE Master Technician and is well versed in diagnostics relative to preventive maintenance and vehicle repair. He has hands on experience scheduling maintenance in both a manual and automated environment. In addition, he has a proven track record of shop management, employee scheduling, inventory control, and warranty procedures. He will be instrumental in working with the Penske, along with Mario Monterroza, our dedicated maintenance supervisor, and with quality assurance input from Brett Baum, our Director of Operations throughout the term of our contract with the City of Monterey Park.



Brian Connell, Area Regional Manager
Mr. Connell has over 20 years experience in transit management, over 26 years in transportation, and has been with Transportation Concepts since November of 1999. Mr. Connell has extensive demand response, fixed-route and express service experience. Over the years he has held responsibility for several fixed route transit contracts throughout Los Angeles County. Brian will assist Brett as needed to insure our proposed Project Manager has all the resources to verify that all reports are produced to ensure contractual compliance. He will perform ongoing analysis of key performance indicators and institute action plans if

Proposal –Operation and Maintenance of the Spirit Bus Service



needed, and, will provide the ongoing leadership support to help maintain an enviable workplace and smooth operation.

Additionally, Brian successfully served as the Project Manager for the Spirit Bus Service from 2001-2004. Brian's resume, as well as other key personnel are included in Section E of this proposal.



Ernesto Lizarraga, Project Manager

Although Transportation Concepts will provide extensive support, our experience in contract operations is that the overall quality of service is only as good as the local team. To this end, TC offers Mr. Ernesto Lizarraga, an experienced and professional operations supervisor with several years of transit management experience in the South bay, to serve as the dedicated leader of the Monterey Park Spirit Fixed Route Service. He will have direct responsibility for this contract and serve as the direct liaison with the City staff as well as service ambassador for the Community Transit services on behalf of the City.

On-site support positions available to Ernesto will include field supervision. Dispatch staff, and, our Director of Operations. The local team will be thoroughly supported by the corporate staff as described previously in this proposal. Mr. Lizarraga is familiar with all aspects of operations and understands what it takes to be successful operating in this industry. Ernesto is a hands-on supervisor that will get out in the field and get involved with the community. He will be in consistent communication with his team to monitor service, review reports, evaluate employee performance, and serve as a role model in the areas of safety and customer service. The City of Monterey Park will have the ability to contact Ernesto at either a transit office during the day and via cell phone at any time. Mr. Lizarraga's resume is included at the end of this section.

Luis "Mario" Monterroza, Maintenance Supervisor



Mr. Monterroza has over 15 years of public transit maintenance experience while working for TC. Over the last 10 years, Mario has served as a shop supervisor, with oversight of 21 vehicles. He has hands on experience maintaining alternative fueled fleets. He clearly understands the requirements associated with preventive maintenance, repair, and regulatory compliance of the designated Monterey Park fleet. Mario will provide supervisory oversight of Penske's maintenance efforts of the Monterey Park fleet and provide the necessary repairs needed while insuring he takes a QA approach with Penske. He will coordinate with Steven Purchase, our Regional Maintenance Director to ensure that all maintenance work is being conducted in accordance with Regulatory, Company and City Standards. Mr. Monterroza's resume is also included at the end of this section as well.

Job Classifications

Position	Number of Employees
Drivers	10 FT / PT as needed
*Director of Operations	As Needed
Project Manager	1.0 FT
Field Supervisor	1.0 FT
Maintenance Manager	1.0 FT
Dispatcher	As Needed
*Safety & Training Supervisor	As Needed
*Penske Technician's	As Needed

*not charged to this project

Wage Scales

(year one)

Position	Wage Range
Drivers	\$13.40
Supervisor	\$14.00
Project Manager	\$17.00
Technician/Mechanic	\$22.00

It is the intention of Transportation Concepts to hire any of the existing employees who are qualified and interested in staying with the contract if Transportation Concepts is the selected contractor. We clearly understand the operating environment and the labor market available to this service area and have set wages accordingly. We have set our training rate at \$12.50 in an effort to attract quality employees while remaining sensitive to the City's budget and competition. Employees will be provided annual increases throughout the term of their employment.

Key personnel will be available to the extent proposed for the duration of the project. No person designated as key to the project shall be removed or replaced without the prior written concurrence of the City.

"City staff has come to rely on location and corporate support and expertise. We value this assistance and believe your company is a partner in our success"

Brian Champion
Contract Administrator
City of Corona

Proposal –Operation and Maintenance of the Spirit Bus Service



FINANCIAL RESOURCES

Under separate cover included with each proposal, please refer to the last two (2) years of our company's audited annual financial statements to assure the City of Monterey Park of Transportation Concepts' financial capability to operate the Monterey Park Spirit bus service.

INSURANCE

Transportation Concepts affirms that it will comply with all insurance provisions set forth in the RFP and will maintain and provide the City with proof of insurance coverage through the entire term of the proposed contract without interruption or break in coverage.

E. RESUMES OF KEY PERSONEL

The following are resumes for the key personnel who will be responsible to insure that the City of Monterey Park Spirit fixed route system is exceeding the expectations of both City Staff as well the the community in which we will serve.

ERNESTO LIZARRAGA
PROJECT MANAGER

STRENGTH *Professional demeanor that sets the example and motivates others to success*

EXPERIENCE *Operations Supervisor – May 2012 - present*

Transportation Concepts, Redondo Beach, Palos Verdes and the City of Avalon, CA

- Responsible for supervision of Beach Cities Transit, as well as PV Transit operation, Playa Vista DAR and Shuttle service as well as a start up manager for the Avalon Transit Services, a 100 percent electric fixed route fleet
- Supervises daily service operation
- Provide daily time checks and perform daily route observations to insure safe and on time performance
- Dispatch responsibility during operating hours to coordinate and resolve any delays
- Conduct daily farebox reconciliation
- Assists in investigating customer comments
- Operate routes as needed

Accomplishments

- Reduced customer complaints through heightened presence in field
- Maintained excellent on-time performance statistics
- Improved employee morale through positive reinforcement tactics
- Achieved perfect attendance recognition for last 3 years
- Developed strong working relationship with PVPTA and Redondo Beach staff

Vehicle Operator – 2011-2012

Fixed Route Vehicle Operator

Los Angeles Metro

- Operate Metro fixed route service in a safe and timely manner in Los Angeles County
- Maintained proper driver logs for CHP regulations
- Identified safety hazards and proposed resolutions to manager

Delivery Truck Driver – 2007-2011

The Coffee Bean, Los Angeles, CA

- Inventoried and loaded Truck according to Route
- Insured accuracy of every delivery
- Reported issues with truck or at each of the stores on his daily route

LUIS "MARIO" MONTERROZA
PROPOSED MAINTENANCE SUPERVISOR

STRENGTH Extensive transit fleet knowledge; familiarity with alternative fuels, and electronics

SKILLS SUMMARY

- Diverse background in Public Transit Maintenance
- Expert fleet technician
- Highly proficient in diagnostics
- Heavy Duty Component Rebuilder
- Keen understanding of fleet regulatory requirements
- Excellent training capabilities to others

EXPERIENCE **Maintenance Supervisor – 2012 – Present**

Transportation Concepts, Torrance, CA

- Responsible for shop supervision and maintenance repair on a fleet of 21 alternative fueled transit buses
- Provide diagnostics and repair of challenging maintenance issues

Lead Mechanic – 2008 to 2012

Transportation Concepts, Los Angeles, CA

- Responsible for planning, organizing and assigning preventive and remedial maintenance work for buses and automobiles
- Accountable for record keeping and scheduling using automated maintenance software that tracks pmi scheduling
- Provides training for incoming technicians
- Conducts fleet inspections

Mechanic – 2005 - 2008

Transportation Concepts, Los Angeles

- Responsible for maintaining gasoline, diesel and alternative fuel buses at several operating locations throughout Los Angeles County.

Accomplishments

- 100% success rate on CHP inspections
- Excellent shop safety record
- Preventative Maintenance Inspection Trainer
- Fleet mechanical problem solver – utilized company wide

EDUCATION **Extensive factory training in bus components and manufacturers:**

- Cummins
- El Dorado National
- Startrans
- Bluebird
- Ricon
- Carrier
- Braun

MICHAEL RAYOS
SAFETY / TRAINING DISTRICT MANAGER

STRENGTH Leadership, employee motivation, operational training

SKILLS SUMMARY

- Highly proficient in operations training.
- Direct experience recruiting, hiring and training employees
- Effective problem solver; prioritize and manage heavy work flow without direct supervision.
- Extensive experience with classroom and btw training curriculum.
- Developed excellent working relationship with all employees.
- Additional skills include TSI certification, smith system and Taptco training instructor.

EXPERIENCE

Safety and Training Manager- 2017 - Present

***Transportation Concepts*, Redondo Beach, CA**

- Responsible for development and update of all vehicle operator training and safety programs for the organization
- Monitors and maintains compliance with FTA substance abuse regulations/audits
- Compiles all safety related data for statistical analysis and NTD compliance and reporting for each project within the organization
- Monitors all operating systems to ensure compliance with safety goals and objectives
- Conducts regular safety and management audits of each location
- Establishes safety and training related action plans as necessary to ensure compliance with all local, state, and federal laws governing transit operations

Risk / Safety Compliance Manager – 2014 to 2017

***Loop Transportation*, San Jose, CA**

- Responsible for management oversight and close out of fixed-route and dial a ride service throughout the County of Yuma
- Provides FTA guidance for operational decision making
- Ensure trip completion, on-time performance, 100% pull outs
- Provides assistance as needed to include dispatch, supervision, telephone information, reporting, training, etc.

Safety Manager – 2011 to 2014

***Southland Transit*, Baldwin Park, CA**

- Responsible for the day to day operations of a Dial a Ride and Fixed Route system.
- Monitored and reported on key performance indicators
- Provided customer service, responded to complaints and commendations in a timely manner, and ensured contract compliance
- Served as Drug and Alcohol manager

Transit Manager – 2009 to 2013

City of Arvin, Arvin, CA

- Responsible for direct oversight of fixed route and paratransit operation
- Served as Transit Manager. Maintenance Manager and Safety and Training Manager
- Provided all new operator training, post accident training, investigation, conflict resolution, conducted driver evaluations.
- Provided direct oversight of on street vehicle operator performance

Operations Manager – 2007 to 2008

Morongo Basin Transit Authority, , CA

- Responsible for the management of a fixed route and dial a ride service.
- on-street supervision of vehicle operators
- Coordinated hiring and training effort
- Lead reporting function
- Ensured Drug and Alcohol compliance
- Served as Taxi Administrator for the area

Account Manager – 2006-2007

Guardsmark, Palm Springs, CA

- Responsible for private security accounts throughout Palm Springs area
- Performed background checks and placed security agents with specific clients depending upon need.

Operations Manager – 2005-2006

Cobb Community Transit, Marietta GA

- Responsible for direct oversight of fixed route operation
- Provided oversight of safety and training program
- Conducted analysis of operating reports for submittal

Assistant Director of Safety and Security – 2004-2005

Toscana Country Club, Indian Wells, CA

- Responsible for operational oversight of a 24 hour security operation
- Provided security training to all employees

Operation Supervisor/Trainer – 1998-2004

Sunline Transit Agency, CA

- Supervised over 120 transit drivers
- Provided Bus Operator Training
- Performed oversight of bus collision investigation for agency
- Generated daily, weekly, and monthly reports

Education:

DMV Certified for Employer Licensing

DMV Employer Testing Program – third party

TSI Certified Train the Trainer and Fatigue Awareness Instructor

TSI Transit Safety Awareness for Compressed Natural Gas Certification

TSI Instructor Bus Collision Investigation Certification

National Safety Council CPR /First Aid Train the Trainer Instructor

Smith System Trainer Certification

BRIAN CONNELL
REGIONAL MANAGER

STRENGTH **Managing employees, community outreach & operations**

SKILLS SUMMARY

- Highly proficient in project management.
- First hand knowledge & experience negotiating labor agreements.
- Effective problem solver; prioritize and manage heavy work flow without direct supervision.
- "Can do" attitude; work in partnership with clients and community.
- Excellent working relationship and reputation in communities served.
- Additional skills include customer service, labor negotiations, vehicle maintenance oversight, scheduling software, NTD reporting, etc.
- Direct experience managing services with CNG fleets

EXPERIENCE **Regional Manager – 7/06 to Present**

Transportation Concepts, Los Angeles, CA

- Responsible for direct oversight of fixed-route and dial a ride operations in Los Angeles and Orange County
- Accountable for human resources, maintenance, system performance, contract compliance, and customer service related to designated contracts.
- Provides assistance and training to supervisors
- Works in conjunction with communities served to educate residents and promote transit
- Develops effective schedules to ensure optimum service and employee satisfaction
- Motivates employees
- Reviews contract specific data to ensure performance goals are met; accurately reports operational statistics in a timely manner
- Maintains consistent communication with clients served

Accomplishments

- Improved on-time performance
- reduced employee turnover and absenteeism
- increased system efficiencies
- reduced customer complaints
- increased overall ridership.

Project Manager – 7/05 to 7/06

Transportation Concepts, San Bernardino, CA

- Responsible for direct oversight of over 150 employees and 100 vehicles for ADA paratransit services throughout San Bernardino County
- Hands on experience generating schedules utilizing Trapeze software
- Direct involvement in customer service training and community outreach

Site Manager – 12/03 to 7/05

Transportation Concepts, San Bernardino, CA

- Responsible for direct oversight of East Valley ADA paratransit operations
- Managed 60 drivers and 30 support staff.
- Worked in conjunction with City to meet regularly with ridership groups relative to information sharing and training
- Directly supervised dispatch staff, maintenance, employees, and administrative staff
- Accountable for all reporting activity

Project Manager – 11/99 to 12/03

Transportation Concepts, Los Angeles, CA

- Responsible for operational performance of a 24 vehicle fixed route service for the Los Angeles County Metropolitan Transit Authority (LACMTA)
- Direct liaison with LACMTA relative to contract compliance and on-street performance.
- Managed all aspects of contract to include on-street operations, safety, maintenance, administration, human resources, and overall system performance

Transit Operations Manager – 04/99 to 11/99

UCLA, Los Angeles, CA

- Responsible for coordination of campus shuttle operations and associated charters at UCLA
- Directly managed and scheduled all operators to ensure on-time performance and safety goals were met.
- Provided comprehensive reporting and analysis relative to operational data
- Participated in system planning and expansion

Project Manager – 05/94 to 04/99

DAVE Transportation, El Monte, CA

- Responsible for the operation and administration of 12 fixed route and paratransit contracts within Los Angeles County
- Direct oversight of call centers, operations managers, maintenance program, safety, and on street performance.

Operations Manager – 07/90 to 05/94

Careline Ambulance, Riverside, CA

- Responsible for day to day management of EMT associates
- Performed all scheduling, training of employees, and performance reviews

Supervisor – 02/87 to 07/90

FTL Trucking, Commerce, CA

- Responsible for scheduling of all product deliveries

EDUCATION **East Los Angeles College – Business Administration**
Pepperdine University – Transit Management Certificate

STRENGTH Managing employees, exceeding contractual obligations & operations

SKILLS SUMMARY

- Highly proficient in FTA triennial, NTD, and Drug and Alcohol audit preparation
- 100% success with CHP inspections.
- Comprehensive understanding of ADA regulations and requirements.
- Effective problem solver; prioritize and manage heavy work flow without direct supervision.
- "Can do" attitude; work in partnership with clients and community.
- Excellent working relationship and reputation in communities served.
- Additional skills include fixed route scheduling, customer service, labor negotiations, vehicle maintenance oversight, NTD reporting, etc.

EXPERIENCE **Director of Operations – 2010 to Present**

Transportation Concepts,

- Direct oversight of all operations
- Provide management oversight support to South Bay contracts
- Ensures contract compliance; accurate data collected and reported; and customer service standards met
- Current emphasis on safety, ADA and other regulatory requirements, and performance goals

Accomplishments

- improved on-time performance
- reduced employee turnover and absenteeism
- increased system efficiencies
- reduced customer complaints

General Manager – 2008 to 2010

Transportation Concepts, Riverside, CA

- Responsible for direct oversight of fixed-route and commuter operations throughout Riverside County for Riverside Transit Agency Contract
 - 86 vehicles
 - 165 employees
- Accountable for human resources, maintenance, system performance, contract compliance, and customer service related to designated contracts.
- Provides assistance and training to supervisors
- Develops effective schedules to ensure optimum service and employee satisfaction
- Motivates employees
- Maintains consistent communication with clients served

General Manager – 2005 to 2008

Transportation Concepts, Sylmar, CA

- Responsible for direct oversight of fixed-route and commuter operations for Metro's contracted bus services- North Region
 - 55 vehicles
 - 110 employees
- Ultimately responsible for compliance with all local, state, and federal regulations governing contract operations
- Coordinated labor negotiations

District Manager – 2002-2005

Transportation Concepts, Los Angeles , CA

- Responsible for district oversight of five contracts throughout Los Angeles County including DAR and FR shuttles
- Responsible for ensuring performance goals were exceeded to include increased passengers per hour and improved on-time performance
- Familiar with all aspects of each contract to include reservations and scheduling passengers and associated technology
- Lead safety and training efforts with emphasis on ADA compliance
- Maintained focus on passenger sensitivity
- Main Liaison with five different clients in five diverse environments

Project Manager – 1999-2002

Transportation Concepts, Carson, CA

- Responsible for operational performance of a 12 vehicle fixed route service involving coordination with other municipal agencies including the City of Carson and METRO
- Managed all aspects of contract to include on-street operations, safety, maintenance, administration, human resources, and overall system performance

General Manager Operations – 1998-1999

S Burde & Company, Johannesburg, South Africa

- Implemented cost cutting initiatives
- Lead new business strategies & marketing plans
- Trained, developed and supervised employees
- Improved client satisfaction as a result of strengthening infrastructure and improving logistical

General Manager/Call Center Manager – 1996 to 1998

Time Warner Publishing, Johannesburg, South Africa

- Directly responsible for profit/loss, forecasts, budget, market strategies, and all other operations
- Developed and implemented nationwide call center
- Directed scheduling and delivery of over 2,000 packages per day

EDUCATION **University of South Africa –Advanced Logistics Management**
Pepperdine University – Transit Management Certificate

RICH ROGERS
CHIEF OPERATING OFFICER

STRENGTH **Executive management, motivation, operational support and customer relations.**

SKILLS SUMMARY

- Skilled executive with extensive transit operations experience
- Highly effective leader
- Expert contract negotiator
- Exceptional organizational, logistical, analytical, and managerial skills
- Accomplished in the areas of human resources, fiscal responsibility and labor negotiations

EXPERIENCE **Chief Operating Officer – 3/05 to Present**

Transportation Concepts, Irvine, CA

- Directs and supports all contract operations.
- Ultimately responsible for contractual compliance/customer relations
- Manages all aspects of passenger transportation services for 20 contracts with 7 direct reports
- Leads and directs transition teams for new contract starts
- Promotes community outreach and outstanding responsiveness

Accomplishments

- Built solid company reputation through integrity and effective operations
- Expanded business base utilizing slow & steady growth strategy
- Established proactive approach to customer service
- Improved overall operating efficiencies through teamwork approach
- Maintains positive working relationship with all clients served.

Senior Vice President – 1/04 to 3/05

MV Transportation, Philadelphia, PA

- Responsible oversight of all operations in the eastern U.S.
- Coordinated all business development efforts for the region
- Served as primary contract negotiator
- Lead start up efforts for several new contract implementations including both fixed route and paratransit operations
- Forecasted financial plans for all eastern operations
- Conducted system analysis and system performance reviews

Sector General Manager – 6/02 to 1/04

Los Angeles County MTA, Los Angeles, CA

- Administered two operating divisions comprised of 365 MTA operated buses and 43 contracted buses servicing 23 lines and carrying 62.3 million passengers
- Oversight of the implementation of a third Division
- Lead planning and operational efforts for efficient services for the Gateway Cities sector

Vice President – 10/99 to 6/02

***Transportation Concepts*, Irvine, CA**

- Directly responsible for success of all fixed-route, paratransit (dial-a-ride) and shuttle contract operations
- Responsible for contract negotiation, management training and development, and new contract start up leadership
- Served as primary customer liaison with clients and quality assurance monitor over contracts

Regional/Area General Manager – 8/96 to 10/99

***Laidlaw Transit/DAVE Transportation*, Orange County, CA**

- Accountable for 40 fixed-route and paratransit contracts throughout the western United States
- Conducted comprehensive operational analysis of each contract
- Developed action plans for operations in which key performance indicators were substandard

Assistant Regional Manager – 01/94 to 08/96

***DAVE Transportation*, Rancho Santa Margarita, CA**

- Directly responsible for administration and operations of 5 operating divisions in the Southwest Region
- Assisted VP in oversight, management, and fiscal responsibility

District Manager – 05/92 to 01/94

***DAVE Transportation*, Santa Ana, CA**

- Responsible for the operation and administration of 5 fixed route and 5 paratransit contracts within Los Angeles County
- Provided hands on support to all Managers in the District

Division Manager – 07/90 to 05/92

***DAVE Transportation*, Los Angeles, CA**

- Responsible for direct oversight of several fixed route and paratransit contracts in Los Angeles County

Project Manager – 07/89 to 07/90

***DAVE Transportation*, Pomona, CA**

- Held primary responsibility for maintenance and operations success of 80 vehicle paratransit contract

Site Manager/Maintenance Manager – 04/87 to 07/90

***Mark IV Charter Lines/Western Transit*, Anaheim/Irvine, CA**

- Effectively lead maintenance and operations for 45 bus fixed-route and paratransit contract with OCTA

Maintenance Manager – 01/85 to 04/87

***Southwest Transit/Magic Carpet Transportation*, Anaheim, CA**

- Provided direct oversight of 50 vehicle fleet

EDUCATION University of Redlands – Business Administration

F. CLIENT REFERENCES

Transportation Concepts has had an excellent performance record relative to the contracts we operate. We have consistently exceeded contractual standards related to our on-time performance record, we have maintained an excellent safety record, and we have a reputation for always getting the job done as promised. We are very proud of our success. Our philosophy is one of always striving for improvement in all that we do. We will impart this philosophy and ingrain it as a culture within the Monterey Park Spirit Bus operation. Although we have listed 5 references on the required form found in this section, we believe that the testimony from existing clients provide potential clients with the ability to clearly evaluate if a contractor is doing what they say they will do.

FORM F
REFERENCE # 1
FIXED ROUTE CLIENT REFERENCES
Copy this form for each of the 3 required references

CLIENT AGENCY NAME: City of Redondo Beach

SERVICE NAME: Beach Cities Transit

STREET ADDRESS: 415 Diamond Street

CITY, STATE, ZIP: Redondo Beach, CA 92648

CONTACT PERSON: Joyce Rooney

EMAIL ADDRESS: Joyce.rooney@redondo.org

PHONE NUMBER: (310) 303 - 0610 ext. 2670

CONTRACT STATUS:

- ☒ Contract current, Beginning Date: 2010 End Date: Current
☐ Contract Ended: _____ (give date)

Reason for contract termination: Not Applicable

How long have/had you held this contract: 9 years years

TYPE OF TRANSIT SERVICES MANAGED (check all that apply):

- ☒ Fixed Route: Number of Peak Vehicles: 10 Total Vehicles: 11
☒ Paratransit: Number of Peak Vehicles: 9 Total Vehicles: 4
☐ Other (describe): _____

PROVIDED BY CONTRACTOR (check all that apply):

- ☐ Revenue Vehicles ☒ Non-Service Vehicles ☐ Fuel
☐ Operating & Maint. Facility ☒ Radio Comm. System

Contractor must also list any contract that has been terminated and the reason of the termination of the contract in the last three years.

FORM F
REFERENCE # 2
FIXED ROUTE CLIENT REFERENCES

Copy this form for each of the 3 required references

CLIENT AGENCY NAME: Playa Vista

SERVICE NAME: Playa Vista

STREET ADDRESS: Brookefield Residential

CITY, STATE, ZIP: 12045 Waterfront Driver, Suite 400

CONTACT PERSON: Dawn Suskin

EMAIL ADDRESS: dawn.suskin@fsresidential.com

PHONE NUMBER: (310) 437- - 6070 ext.

CONTRACT STATUS:

☒ Contract current, Beginning Date: 2013 End Date: Current

☐ Contract Ended: _____ (give date)

Reason for contract termination:

How long have/had you held this contract: 7 years

TYPE OF TRANSIT SERVICES MANAGED (check all that apply):

☐ Fixed Route: Number of Peak Vehicles: Total Vehicles:

☐ Paratransit: Number of Peak Vehicles: _____ Total Vehicles: _____

☐ Other (describe): _____

PROVIDED BY CONTRACTOR (check all that apply):

☐ Revenue Vehicles ☒ Non-Service Vehicles ☒ Fuel☐ Operating & Maint. Facility ☐ Radio Comm. System

Contractor must also list any contract that has been terminated and the reason of the termination of the contract in the last three years.

FORM F
REFERENCE # 3
FIXED ROUTE CLIENT REFERENCES
Copy this form for each of the 3 required references

CLIENT AGENCY NAME: City of Avalon

SERVICE NAME: Avalon Transit

STREET ADDRESS: 410 Avalon Canyon Road

CITY, STATE, ZIP: Avalon, CA 90704

CONTACT PERSON: Audra McDonald

EMAIL ADDRESS: audra1@cityof avalon.com

PHONE NUMBER: (310) 510 - 0220 ext. 118

CONTRACT STATUS:

- ☒ Contract current, Beginning Date: 2016 End Date: Current
☐ Contract Ended: _____ (give date)

Reason for contract termination: _____

How long have/had you held this contract: 3 years

TYPE OF TRANSIT SERVICES MANAGED (check all that apply):

- ☒ Fixed Route: Number of Peak Vehicles: 2 Total Vehicles: 2
☒ Paratransit: Number of Peak Vehicles: 1 Total Vehicles: 2
☐ Other (describe): _____

PROVIDED BY CONTRACTOR (check all that apply):

- ☒ Revenue Vehicles ☒ Non-Service Vehicles ☐ Fuel
☐ Operating & Maint. Facility ☒ Radio Comm. System

Contractor must also list any contract that has been terminated and the reason of the termination of the contract in the last three years.

FORM F
REFERENCE # 4

FIXED ROUTE CLIENT REFERENCES

Copy this form for each of the 3 required references

CLIENT AGENCY NAME: PVVTA

SERVICE NAME: Palo Verde Valley Transit Authority

STREET ADDRESS: 235 North Broadway

CITY, STATE, ZIP: Blythe, CA 92225

CONTACT PERSON: Joseph DeConinck

EMAIL ADDRESS: joeydeconinck@gmail.com

PHONE NUMBER: (760) 250 - 5918 ext. _____

CONTRACT STATUS:

☒ Contract current, Beginning Date: 2003 End Date: Current
☐ Contract Ended: _____ (give date)

Reason for contract termination: _____

How long have/had you held this contract: 16 years

TYPE OF TRANSIT SERVICES MANAGED (check all that apply):

☒	Fixed Route: Number of Peak Vehicles: <u>5</u> Total Vehicles: <u>9</u>
☒	Paratransit: Number of Peak Vehicles: <u>1</u> Total Vehicles: <u>2</u>
☐	Other (describe):

PROVIDED BY CONTRACTOR (check all that apply):

☐ Revenue Vehicles ☒ Non-Service Vehicles ☐ Fuel
☐ Operating & Maint. Facility ☒ Radio Comm. System

Contractor must also list any contract that has been terminated and the reason of the termination of the contract in the last three years.

FORM F
REFERENCE # 5

FIXED ROUTE CLIENT REFERENCES

Copy this form for each of the 3 required references

CLIENT AGENCY NAME: City of Glendora

SERVICE NAME: City of Glendora

STREET ADDRESS: 116 East Foothill Blvd

CITY, STATE, ZIP: Glendora CA 91741

CONTACT PERSON: Steven Mateer

EMAIL ADDRESS: smateer@ci.glendora.ca.us

PHONE NUMBER: (626) 852 - 4646 ext. _____

CONTRACT STATUS:

☒ Contract current, Beginning Date: 2009 End Date: Current
☐ Contract Ended: _____ (give date)

Reason for contract termination: _____

How long have/had you held this contract: 10 years

TYPE OF TRANSIT SERVICES MANAGED (check all that apply):

☒ Fixed Route: Number of Peak Vehicles: 3 Total Vehicles: 3
☒ Paratransit: Number of Peak Vehicles: 10 Total Vehicles: 10
☐ Other (describe): _____

PROVIDED BY CONTRACTOR (check all that apply):

☐ Revenue Vehicles ☒ Non-Service Vehicles ☐ Fuel
☐ Operating & Maint. Facility ☒ Radio Comm. System

Contractor must also list any contract that has been terminated and the reason of the termination of the contract in the last three years.

FORM F
REFERENCE # 6
FIXED ROUTE CLIENT REFERENCES

Copy this form for each of the 3 required references

CLIENT AGENCY NAME: City of Corona

SERVICE NAME: Corona Transit

STREET ADDRESS: 730 Corporation Yard Way

CITY, STATE, ZIP: Corona CA 92880

CONTACT PERSON: Nelson Nelson or Sudesh Paul

EMAIL ADDRESS: Nelson.Nelson@CoronaCA.gov / Sudesh.Paul@CoronaCA.gov

PHONE NUMBER: (951) 817 - 5765 ext. _____

CONTRACT STATUS:

☒ Contract current, Beginning Date: 1999 End Date: 2018

☒ Contract Ended: August 2018 (give date)

Reason for contract termination: Opted to go with large National Transit Company

How long have/had you held this contract: 19 years

TYPE OF TRANSIT SERVICES MANAGED (check all that apply):

☒ Fixed Route: Number of Peak Vehicles: 7 Total Vehicles: 9

Paratransit:	Number of Peak Vehicles:	13	Total Vehicles:	15
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☐ Other (describe): _____

PROVIDED BY CONTRACTOR (check all that apply):

☐ Revenue Vehicles ☒ Non-Service Vehicles ☐ Fuel☒ Operating & Maint. Facility ☐ Radio Comm. System

Contractor must also list any contract that has been terminated and the reason of the termination of the contract in the last three years.

G. OPERATIONS PROGRAM

As a professional provider of transportation services for over 30 years, we have developed and implemented programs for a full range of transportation services. Generally, our programs include the following:

- Ⓢ Safety – employee, ridership, maintenance shop, environmental, accident/incident prevention and response.
- Ⓢ Customer Service – passenger relations, disability awareness.
- Ⓢ Employee Development – recruitment, screening, hiring, training, and supervision.
- Ⓢ Maintenance – preventive, body work, warranty, parts inventory, vehicle appearance, heating/air conditioning, audit/inspection, and technician training.
- Ⓢ Vehicle Operation – employee check in, vehicle inspection, dispatch/vehicle communications, on time performance, route supervision, fare collection and extensive training.

All of these programs will be in place in some format for the Monterey Park Spirit Bus Service in our effort to exceed your expectations and will be discussed in detail in our Work Plan section. In order to successfully facilitate our programs throughout each of our operations we must effectively maintain our support structure and ensure that each area is developing and continuously improving. Every person on our team must demonstrate a high degree of passion for customer service and be able and willing to provide it to the community and the system ridership.

Unique Capability

Transportation Concepts is unique among transportation providers. Although we operate several transportation contracts, we ensure that each client is treated as though they are our only customer. This service commitment allows Transportation Concepts to provide the following unique benefits.

- ◆ **Flexibility**
- ◆ **Creativity**
- ◆ **Direct Senior Management Involvement**
- ◆ **Local Dedication to Service**
- ◆ **Community Involvement**

Our firm takes great pride in its growth, client list and satisfied customers. We are a "Service Company", and the strength of our organization is found in our "Hands-On Management" approach and the quality of our people.

Work Plan

Although Transportation Concepts operates as a dba under Parking Concepts, the provision of effective transportation operations is the core business of Transportation Concepts. We do not have other businesses that divert focus from our primary objective with our clients and potential clients such as the City of Monterey Park; which is to transport passengers safely and effectively create a positive image for the City as well as our organization simultaneously. Our concentration remains on your service. If additional services are needed other than the provision of the scope of the proposed transit services, we have internal staff that can provide consulting and assistance in the areas of route design, maintenance, labor, risk management, safety, technology, and environmental concerns. If Transportation Concepts does not have internal staff that can provide assistance to the degree necessary, we have several professional consultants that we work with regularly that will provide service as necessary.

Our objective is to ultimately ensure that each passenger riding the Monterey Park Spirit Bus Service receive a pleasant riding experience contributing to an overall positive association with the City of Monterey Park. Part of our efforts include: hiring locally, hiring as many of the current employees (that are qualified and interested) as possible, and creating a customer focus culture. In addition, our corporate team will provide as much support as necessary.

An important element of having the ability to carry out day to day operations is contingent upon how you treat your employees. We view the employees as the most important part of our internal business. Therefore, it is crucial that we provide a working environment in which each employee is motivated and is truly part of the team. An attractive wage and benefit plan is crucial to this effort.

Service Delivery

Roll Out

The Supervisor monitors the promptness of the vehicle operator in relation to their report time. If an employee is late for their report time by more than 5 minutes, an extra board driver will be assigned to the work-run for the day. Pre-trip inspection is also carefully monitored to ensure thoroughness and efficiency. Lastly, each vehicle's roll out time will be recorded and used to factor a rollout on-time percentage that is evaluated on a daily basis by the Project Manager. Our Supervisor will be in place during all hours of operation.

Supervision

The Supervisor will monitor the daily activities of the Spirit operations. Their responsibilities will include, but not be limited to;

- Knowledge of shuttle routes
- Training employees
- Communicating instructions
- Reviewing driver activity reports, informing management of customer/driver issues

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- Interacting with drivers and passengers, responding to passenger concerns,
- Counseling personnel
- Monitoring service intervals and vehicle spacing if needed
- Have the ability to drive system vehicle if necessary

Service Monitoring

Daily service monitoring is an important ingredient that Transportation Concepts emphasizes with its staff to ensure maximizing the performance toward the system goal of 100 percent on time performance. Specifically, service roll out, shift change, the layover area, morning and afternoon peak traffic flow patterns, road observation and ride-checks are all focal points that our team is responsible for on a daily basis.

The Supervisor will provide direct oversight of on-the-road operations. This individual will conduct road observations and unobserved checks. Road observations are unscheduled checks designed to monitor on-time performance, vehicle cleanliness, and safe and courteous driving. Unobserved checks are observations of pick-up points performed on a random basis. The data from these random checks can lead to enhanced evaluation of service productivity and performance standards.

The supervisor will be responsible to respond to passenger incidents, traffic accidents and road calls, as well as provide re-routing recommendations as necessary.

Accident/Incident Reporting

The following are the procedures in the event of an accident or incident:

- Notify the City of Monterey Park contract administrator immediately of any accident or incident.
- Respond to any emergency or accident involving property damage, passenger injuries, or as requested by the City of Monterey Park during or after the operational hours of the service.
- Report emergencies or incidents involving injuries, major damage, or media coverage to the City of Monterey Park immediately after occurrence.
- Determine if employee post accident drug and alcohol testing is required in conjunction with FTA guidelines.
- Complete internal accident/incident investigation to determine cause and provide solutions to prevent reoccurrence.

Vehicle Break Down/Road Call Procedures

In the event of a vehicle failure, Transportation Concepts will deploy an appropriate vehicle immediately to transport the passengers aboard the failed vehicle. Our goal is a 15 minute response time. However, as this could be difficult during periods of intense congestion during peak service times, our plan is to stage a spare vehicle in the service area during the Spirit operating hours. The supervisor will be directed to proceed to the lot to take the staged bus out for immediate replacement if necessary.

Our Supervisor will respond to the downed vehicle. If the failure is not immediately repairable, the bus will be immediately towed. A Road Call Report is used each time a

vehicle has to be exchanged due to a malfunction or a technical problem. The personnel attending the road call complete the pertinent information on the Road Call Report form and the form is signed and the information entered on to a Vehicle Repair Order form.

Employee Work Rules -TC Employee Handbook

Our Employee Handbook is vital, as it sets the tone for the company's expectations of its employees. The Handbook incorporates our philosophy for excellence and ensures that all employees understand that our success is a result of their efforts. A copy of our Employee Handbook is available to the City upon request.



Proposed Wages and Benefits

TC has every intention of offering employment to the current hourly employees that are qualified and interested. It is our experience that when employees feel valued, they simply perform better. In our experience employees like to feel valued as a result of competitive wage and benefit levels, participation, and fair treatment. Transportation Concepts has utilized this information and has applied it to our approach to operations. Our philosophy is to create a "family-like" environment in which each employee has a role and we all work towards the same goal. We celebrate our accomplishments and work together on any challenges. It is very simple. Through this approach, we have seen extremely favorable results to include:

- **Improved attendance**
- **Improved safety performance**
- **Improved retention rates**
- **Improved productivity**

Safety Policy and Awareness

The effectiveness of any program is dependent upon the existence of a clear direction. This is particularly true in the area of safety. Transportation Concepts has adopted a safety policy statement that declares the following:

- ◆ Safety is the number-one priority of our operations
- ◆ Safety is everyone's Responsibility
- ◆ All accidents are preventable
- ◆ All unsafe acts and conditions must be eliminated to prevent accidents
- ◆ Safety is not simply another rule to follow, but a guiding principle.

Driver Safety Record

With attention to safety TC is proud to have continued over the years to recognize an outstanding Safety Record. **Over the last 5 years, Transportation Concepts has traveled**

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over 4.5 million miles and has averaged over 150,000 miles of safe driving between reportable accidents. TC's approach starts with investing the time through training to make every employee extremely safety focused, ultimately leading to a enriched safety culture which will be a significant benefit to The City of Rosemead's Dial-A-Ride and Explorer Services.

Safety Record Monitoring

A great promoter of awareness, Transportation Concepts utilizes a thorough system of monitoring to review/record and guarantee the effectiveness of the Safety Program. Drivers' motor vehicle records will be monitored through the State of California's program, in which an updated MVR report is generated every twelve months, or whenever a change occurs. In addition, on-street observations are performed as well as paperwork reviewed. Observations are documented and serve to provide valuable feedback to the employees regarding their performance.

Safety performance is also monitored in investigating, reviewing, compiling, and analyzing accidents. Every accident is thoroughly investigated by the Safety Department. The result of the investigation is a determination of preventability. Transportation Concepts defines a preventable accident as one in which the operator failed to do everything reasonably possible to prevent the accident. In the event that an accident is deemed preventable, retraining is scheduled.

Drug and Alcohol Screening

Transportation Concepts is committed to providing consistently safe and dependable transportation service to the passengers of the transit systems that it operates. In compliance with these goals, and with the Federal Transit Administration's requirements, the company has adopted a Drug-Free Workplace Policy.



The Screening Guarantee:

- To ensure that employees are not impaired in their ability to perform their assigned duties in a safe, productive and healthy manner.
- To create a workplace environment free from the adverse effects of drug and alcohol use and misuse.
- To prohibit the unlawful manufacture, distribution, dispensing, possession or use of controlled substances
- To encourage employees to seek professional assistance anytime personal problems, including alcohol or drug dependency, adversely affect their ability to perform assigned duties.

Transportation Concepts' Drug and Alcohol screening policy applies to all safety-sensitive and non-safety-sensitive Transportation Concepts employees, paid part-time employees and contractors when they are on TC property or performing any transit related business for TC.

Transportation Concepts is a zero tolerance employer. We aggressively promote a drug free workplace. We have developed strong drug and alcohol policies and procedures. These policies exceed the requirements of the Federal Transit Administration Drug Free Workplace policy and testing program outlined in 49 CFR parts 653 & 654 and 49 CFR Part 40. Drug screening is conducted for pre-employment selection purposes, reasonable cause, random selection, biennial Department of Transportation physicals, and after all accidents that meet FTA guidelines.

This policy applies to all safety-sensitive and non-safety sensitive Transportation Concepts property or when performing any transit-related business for Transportation Concepts. The safety-sensitive function is any duty related to the safe operation of transit service including the operation, dispatch, and maintenance of a revenue service vehicle.

All safety-sensitive and non-safety-sensitive employees shall be subject to the following testing:

- Pre-Employment
- Reasonable Suspicion
- Post-Accident
- Return to duty after a leave of absence exceeding 30 days

All testing will be conducted consistent with the procedures set forth in 49 CFR Part 40. The company's drug screening program is conducted by US Healthworks. Analytical urine testing shall be used for drug testing, Tests for alcohol concentration will be conducted utilizing a National Highway Traffic Safety Administration approved evidential breath testing device (EBT) operated by a trained breath alcohol technician (BAT). Any employee tested that has a confirmed positive drug or alcohol test will be removed from his/her position and informed of educational and rehabilitation programs available. A positive drug and/or alcohol test will also result in disciplinary action up to and including termination



Safety Awareness = Safety Success

The combination of the implementation of a thorough safety policy, a recruiting and screening process that focuses on safety, a comprehensive training program, and a monitoring system to record and identify performance, results in a genuinely safety oriented company. The safety of the services provided by Transportation Concepts is acknowledgment of the success of the overall program.



Safety Incentive Programs

All employees will be eligible to participate in a safety incentive program with the potential to receive several prizes and rewards for performance excellence.

The company's safety policy also includes the provision for safety incentives in order to support and motivate the process, and to help achieve success. Transportation

Concepts recognizes and rewards exemplary safety performance through such programs as our Annual Safe Driving Recognition, and Quarterly Safety Bonus prizes. It is important to note that each group of employees is diverse. Therefore, effective motivational tools are difficult to pin point until you have a personal knowledge of each of the members of the group. It is for this reason that Transportation Concepts develops a customized incentive plan based on input from the group. If we are the selected contractor, we will work with the employees to present an effective incentive plan.

In fact, Transportation Concepts encourages locations to support ongoing safety campaigns. A few years ago a safety slogan contest was held company wide to encourage involvement and participation in our efforts to promote safety in all aspects of life in addition to the work place. The employees responded with immense enthusiasm. We received 93 responses and chose the winning entry:

"SAFETY IS AS SIMPLE AS YOUR ABC's – Always be Careful"

The idea was to incorporate safety practices into your daily activities. Think safe and act safe always.

Our program for the Monterey Park Spirit Service will be customized and aligned with contract goals and objectives as outlined in our Operating Agreement. We believe in providing the employees input as to the specific program to be put in place. This gives each employee a sense of ownership, pride, accountability, and increased motivation to perform

Attached is an example of one of our location incentive programs:

COMPONENTS OF SAFETY/INCENTIVE PROGRAM

1. Teams
2. Monthly Safety Cards
3. Raffle Box
4. Prizes and Awards
5. Safety Bulletin Board

1. Teams

The greatest problem that companies are faced with today is a lack of loyalty. Too many employees feel like they are on their own, and that their employer does not care about them. Sometimes the first reaction of an injured worker is to find a lawyer, anticipating that his employer may contest the injury, or in some way deny him his benefits. Trust has greatly diminished in the last decade.

Teams give employees a sense of belonging to something. Most importantly, they remind the employees that they have a responsibility to other people in the company, and that they are accountable to other people. Peer pressure is created. Employees are encouraged to help each other out, and to stay safe for the benefit of the team. Conversely, the employee who does not care, does not follow safety procedures, or considers filing fraudulently, is now pressured to do the right thing, as his actions may jeopardize all the members of his team.

2. Monthly Safety Cards

The cards are distributed and collected every month by the supervisors or managers. On the card, each employee signs his/her name, verifying that he/she has been injury-free during that month. This provides a record for the company, and a reminder to the employee that helps discourage that helps discourage any post-termination claims.

3. Raffle box

The safety cards with each employee's name are collected in the Raffle Box. It is from this box that a drawing is held each month, with the winners receiving the prizes. The box should be kept in a safe place, and checked each month prior to any cards being dropped in.

4. Prizes and Awards

The most important rule of thumb for a successful safety/incentive program is to offer at least one prize that is of significant value. The equivalent of one week's pay can be used as a yardstick. If the top prize is too low in value, the employees will not be motivated to change their behavior. It is also possible to set the prize too large. The result of this is often unreported, but legitimate injuries. Resentment of the injured worker may also result if the lost prize is too large. The number of prizes may vary, but the rule of thumb should be roughly one prize per twenty-five (25) employees. Over the course of a year, that would give the employee a one in two chance of winning, if the company was injury-free. In a company of 100 employees, the prizes might be as follows:

1st Prize: \$100.00 2nd Prize: \$ 50.00 3rd Prize: \$ 25.00

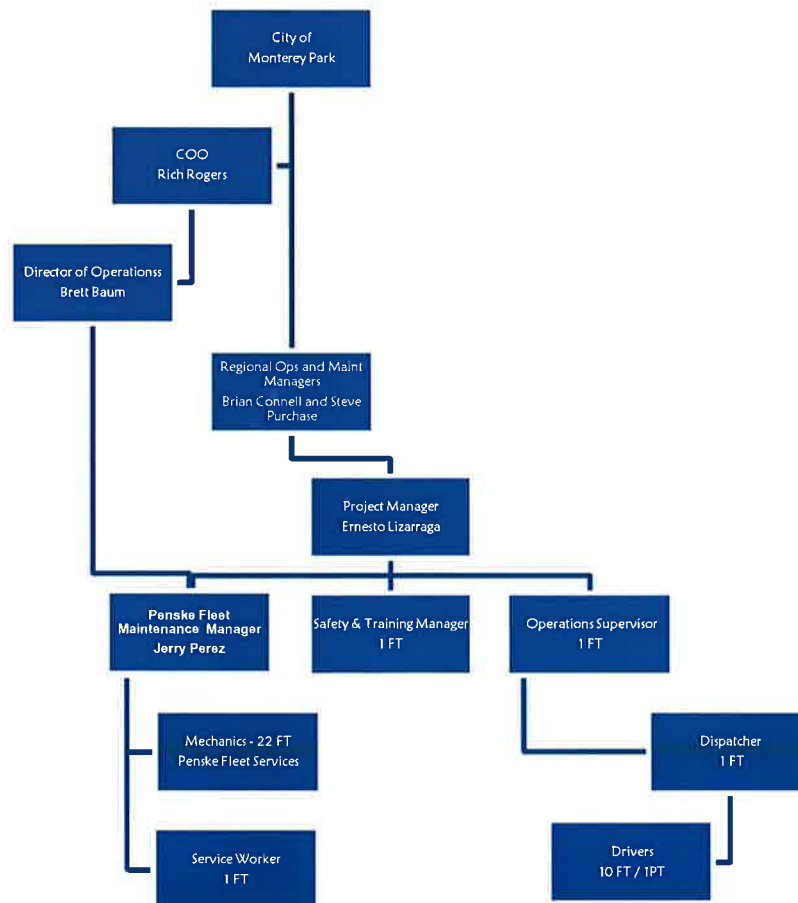
5. Safety Bulletin Board

One area needs to be identified for all the safety announcements, posting of teams, and celebration of accomplishments. Pictures taken of the winners should be displayed prominently every month, with certificates of recognition. The area should be easily accessible to all employees, and should be updated promptly. It is logical to put this Bulletin board in the same area as your safety announcements and required posters.

STAFFING PLAN

The following is a detailed breakdown of the staffing, including job descriptions for the Monterey Park Spirit Service:

Position	Number of Employees	% of Dedicated Time
Drivers	10 FT/ 1 PT	100%
Project Manager	1 FT	100%
Operations Supervisor	1 FT	100%
Safety & Training Manager	1 FT	As Needed
Maintenance Supervisor	1 FT	100%
Dispatcher	1 FT	As Needed
Maint. Manager – Penske	1 FT	As-Needed
Mechanic – Penske	22 FT	As Needed



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Job Description Summaries

Job Title	Primary Responsibilities and Functions
Project Manager	▪ Primary liaison to City of Monterey Park ▪ Provides tactical and strategic planning for daily Spirit services. ▪ Overall responsibility for the Spirit services, including safety, system performance, quality, adherence to all governmental regulations, and compliance with the City/TC – established standards and procedures. ▪ Ensures system is properly staffed given requirements and goals. ▪ Monitors service performance against set goals/targets. ▪ Reviews daily, weekly, monthly reports ▪ Ensures that all customer service issues are responded to, resolved and reported in a timely manner.
Operations Supervisor	▪ Provides day to day on-site supervision ▪ Oversees the day-to-day operations, including all personnel. ▪ Submits formal operational reports at specified intervals to Project Mgr. ▪ Directs all on-street operations ▪ Collects, Compiles, and distributes operational data. ▪ Responds to on-street incidents ▪ Ensures that the Spirit service is provided in a safe, reliable and timely manner. ▪ Provides excellent customer service ▪ Assists in conducting Behind the Wheel and Classroom training.
Safety/Trainer	▪ Oversees safety and training for all staff, including Operators and Dispatchers; ensures that refresher training and additional course work are provided as required. Administers safety program. ▪ Assists in conducting Behind the Wheel and Classroom training. ▪ Oversees Site Safety Plan
Dispatcher	▪ Assists in customer service efforts, provides telephone information, and directs customers ▪ Maintains radio contact at all times with drivers ▪ Inputs all data to ensure timely and accurate reporting ▪ Processes payroll, order supplies, and provides assistance as necessary
Penske Maintenance Mgr & Mechanics	▪ Follow appropriate maintenance intervals for preventive maintenance program ▪ Perform and track all vehicle maintenance activity and repair ▪ Comply with all CHP regulations; prepare shop; prepare vehicle records ▪ Administer warranty program ▪ Effectively manage and track inventory
Utility Worker	▪ Provides all bus cleaning activities for the Spirit service ▪ Ensures all necessary supplies are purchased and kept on hand ▪ Maintains Daily Cleaning Schedules for buses ▪ Coordinate with Drivers and Management.
Driver	▪ Safely transport passengers throughout the service area. ▪ Provides excellent customer service

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Recruiting and Hiring

Transportation Concepts has a proven and solid recruiting plan in place that involves getting out into the community to promote local hiring. In other locations this has resulted in a very stable workforce with low turnover. We will utilize a thorough, seven-step selection process in order to identify the right candidate:

<u>Job Description</u> ◆ After filling out an application, an applicant is given a job description that describes in detail all of the aspects of the job. ◆ This lets the applicant know up front the requirements of the job and makes a statement very early on to the applicant about the importance of safety in the operation.	<u>Application review.</u> ◆ This process includes statements by the applicant regarding their previous employment history, previous driving record history, any history of vehicle accidents, and any history of workplace injuries. ◆ This bring up potential 'red-flags' that may exist in an applicant's background as far as safety is concerned.	<u>Motor Vehicle Record Check</u> ◆ Applicants are required to submit a current H-6 printout from the Department of Motor Vehicles, which details the applicants' driving record for the past ten years. ◆ Any applicant who is unable to produce the original H-6 document is not given further consideration for employment.
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<u>Interview</u> ◆ All of the supervisors who are responsible for interviewing are trained in specific questions to ask that, among other things, will identify an individual's safety awareness. ◆ The purpose of the interview is to add clarification and further detail to the information contained on the application form. ◆ Individuals who are able to follow directions and maintained satisfactory relationships with their former supervisors and coworkers, have been found to be strong candidates to become safe employees.	<u>Reference Checks.</u> ◆ 3 most recent employers must be indicated on the application. ◆ They must sign an authorization form, which gives permission to their former employer to comment upon their performance as an employee. ◆ Any warning signs regarding the safe working practices of the applicant will raise serious questions as to their suitability as a Transportation Concepts employee.	<u>Criminal Background Check.</u> ◆ All applicants who are required to complete a criminal background check. ◆ This check, conducted by the company in conjunction with InfoLink, will identify any criminal convictions that the applicant may have incurred.	<u>Physical and Drug Test.</u> ◆ All Transportation Concepts employees must pass a physical examination and a drug screen prior to being accepted as an employee. ◆ The company's physical examination meets the Department of Transportation requirements and results in a DOT medical card. ◆ The company's drug screening program is conducted by US Healthworks and meets all Federal Transit Administration guidelines.
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Job Description

When an applicant arrives at Transportation Concepts to fill out an application for employment, they are given a job description that describes in detail all of the aspects of the job that the applicant will be expected to perform if they are selected for the position.

Application Review

The review of the application includes statements by the applicant regarding their previous employment history, their previous driving record history, any history of vehicle accidents, and any history of workplace injuries.

Motor Vehicle Record Check

Each applicant is required to submit a current H-6 printout from the Department of Motor Vehicles, which details the applicants' driving record for the past ten years. Only original, current H-6 reports are accepted. Any applicant who is unable to provide this is not given further consideration.

Interview

All of the staff who are responsible for interviewing are trained in specific questions to ask that, among other things, will identify an individual's initial skills and more importantly their attitude towards passengers, peers and the service they were provide.

Reference Checks

The applicants must identify on the application form their three most recent employers. In addition, they must sign an authorization form, which gives permission to their former employer to comment upon their performance as an employee. The employment references that each applicant identifies are contacted and questioned about the work performance of the applicant. All of the responses gained through these references are documented in order to provide organization and structure to the process.

Criminal Background Check

Each Transportation Concepts Operator providing service for the City of Monterey Park will successfully have passed the Live Scan background check through the City of Monterey Park Police Department before hiring; these qualifications must also be maintained throughout employment.

- Must have five years of driving experience.
- May have one break or interruption in holding a valid license of no more than 90 days during the five-year period immediately preceding the submittal of an employment application. The break or interruption cannot be the result of a state having suspended or revoked the license and the candidate must still be able to demonstrate that they have a minimum of five years driving experience.
- No felony convictions.
- No more than two at-fault or preventable accidents in the last three years.
- No more than two convictions of moving violations in the last three years.
- When combined, no more than two incidents (preventable accidents or moving violations) during the last three years.
- No record of DUI or DWI within the past 15 years.
- Not subject to outstanding warrants for arrest.

Physical and Drug Test

All Transportation Concepts employees must pass a physical examination and a drug screen prior to being accepted as an employee. The company's physical examination meets the Department of Transportation requirements and results in a DOT medical card. The company's drug screening program is conducted by US Healthworks and meets all Federal Transit Administration guidelines.

Classroom Training Program

Training, at Transportation Concepts is a comprehensive program that encompasses new driver training, orientation to the safety policy of the company, and regular, ongoing in-service training for all existing employees. Using the



company's proprietary Driver Training program, which has been developed using materials from the Transportation Safety Institute, APTA, TAPCO, The National Safety Council, ADA, and OSHA, our new driver training program provides both classroom and behind-the-wheel instruction. The key elements in our **TAPCO** operating procedures are the concern our professional bus operators demonstrate for the safety and comfort of their passengers, and the drivers' effective technical performance in operating the equipment. The training will be conducted by the Safety and Training Manager. He will work on contract specific training activities to ensure that each component of training is in alignment with company policies and procedures, contractual requirements, and those required by regulatory agencies governing transit in the State of California.

New drivers hired for the Monterey Park Spirit operation will be required to complete the following training program.

- ◆ **40 hours classroom instruction**
- ◆ **20-40 hours Behind the Wheel training to include CDL and Revenue Training**
- ◆ **16-20 hours of in-service cadet training**



This new driver training course provides instruction in the following general areas:

- ◆ Driver Responsibilities and Procedures
- ◆ Monterey Park Spirit and Company Policies and Procedures
- ◆ Public and Passenger Relations
- ◆ Advanced Customer Service
- ◆ Passenger Sensitivity Training
- ◆ Lift Operation and Wheelchair Securement
- ◆ Defensive Driving
- ◆ Substance Abuse Program
- ◆ Map Reading (all drivers will be provided map books)
- ◆ CDL training
- ◆ Radio Communication
- ◆ Emergency Procedures
- ◆ Accident Reporting
- ◆ Passenger Loading and Unloading
- ◆ Fare Policy and Collection
- ◆ Driving Skills
- ◆ Vehicle Operations
- ◆ ADA Regulations

Behind the Wheel Training Program

As a new operator is trained, they progress to on the road training with a qualified driver trainer. This individual will reinforce the basics of defensive driving and the handling of

the specific vehicle they will be operating. Time is also spent as a participant/observer. The following are some of the components of the behind-the-wheel training program:

- ◆ Basic vehicle handling skills including; starting, stopping, turns, and backing
- ◆ Proper loading and unloading procedures.
- ◆ Proper lock-down (equipment) and securing procedures.
- ◆ Paperwork requirements.
- ◆ Specific route training.
- ◆ Providing passengers with courteous and comfortable transportation.
- ◆ Proper use of the radio, Farebox and METRO Tap System.
- ◆ Care and maintenance of the vehicle and equipment, accident procedures, dress code.
- ◆ Special driving skills needed when transporting passengers.
- ◆ Special driving skills needed when driving in periods of fog, rain and unseasonable weather.

During the behind-the-wheel training program, the trainee, under supervision, performs all service driving, all paperwork and all radio communications. Throughout the training program the qualified operator trainer is continually evaluating the performance and personalities of candidates in an effort to recognize the individuals who have the best chance to succeed. Not all people are able to deal with the demands of public transit. The behind-the-wheel portion of the training program can be a very useful mechanism for screening those individuals not suited for public transit service.

Continual Training Program

Transportation Concepts on-going training program will ensure a safe operating environment and address unsatisfactory operator performance, provide refresher training and safety awareness for all operators, and provide training if an operator switches to a different size/type of revenue vehicle. This training includes monthly safety meetings, safety orientation for new employees, and retraining as necessary for employees who have been involved in accidents. In addition, the Manager will conduct a one hour evaluation ride check with each driver at least once every six months, and one hour refresher training on proper use of wheel chair lifts at least once every twelve months. All preventable accidents result in retraining for the individual in an effort to prevent recurrence of the accident. Training is customized for the individual based upon the nature of their infraction.



Handling Operational Emergencies

Another element of our training is handling operational emergencies. In any transportation system, operational emergencies will occur. In general, Transportation Concepts believes that with thorough operator training and a high quality preventive maintenance program these emergency situations can be minimized.

The following is a brief overview of some guidelines used for handling emergency situations that may arise. Each situation is not covered in explicit detail for the purpose of this proposal, but enough detail is provided to show that the procedures are well thought out and appropriate.

General Emergency Guidelines

In most emergency situations, driver attitude and initial response sets the tone for subsequent occurrences and the eventual severity of the situation. If the operator panics and loses control of the situation, tensions are heightened and damages may become greater than they otherwise would have.

Transportation Concepts attempts to prevent this from occurring in whatever emergency may arise. This effort begins with operator training. Emergency situations are documented, explained, and practiced in initial training sessions. Each documented emergency procedure begins with the instruction to remain calm.

To give the driver on the scene additional guidelines, emergency phone numbers are also kept handy on vehicles, in supervisor notebooks, and in dispatch. Each emergency procedure places the safety of the passengers first and addresses equipment, schedules or other subordinate matters only after the safety of the passengers is secured. Additionally, we emphasize rapid on-route supervisory and emergency team response to the situation.

Emergency Evacuation of Vehicles

Drivers are instructed as to what circumstances (fire, heavy smoke, bomb threats, etc.) to evacuate the vehicle. Vehicle is pulled over, stopped and turned off out of the flow of traffic, if possible. If not, steps are taken to ensure that passing traffic is stopped before evacuating. Passengers are instructed in a clear, calm tone as to what procedure to follow. The driver remains on board the vehicle to supervise evacuation procedures. The driver then attends to the vehicle, if possible without jeopardizing personal safety.

Special care must be taken when transporting individuals who do not have the flexibility to evacuate themselves should an emergency occur. Transportation Concepts' Passenger Assistance Training covers critical items regarding driver duties during evacuations of vehicles or use of vehicles to evacuate people from other emergencies. The training program will stress how to evacuate persons using mobility aid devices or who are mentally challenged. It will also include complete familiarity with the operating equipment and the use of safety-related equipment, including fire extinguishers, emergency exits and quick removal of straps.

Communication Plan

Dispatch

The dispatcher on duty is responsible for coordination and communications with vehicle operators. The purpose of dispatch is to communicate daily bus assignments, late pull-outs, detours, and other issues that could potentially affect service. In addition, this

person is responsible for monitoring and verifying all of the driver information that is input for the generation of monthly reports. For this reason, it is critical that this individual understand the service, have knowledge and ability relative to the technology associated with the system, and understand what is logical when reviewing a report

Radio Communications

Transportation Concepts believes that an effective communication system is critical towards the provision of quality transportation service. Constant communication is required between dispatch supervisory and management personnel and drivers. These communications can include service needs, schedule problems, accidents/incidents, driver needs and ridership information. Management must be aware of all activities on a real time basis. Supervisory and management personnel must be accessible at all times.

The heart of our communications system for the Monterey Park Spirit Bus Service will be the two-way mobile radio communication system. In addition to this radio communications system, our Project Manager and Supervisor will also carry mobile phones at all times and of course be available via email. This will allow City staff to contact our staff at any time. We will provide supervisory coverage during all hours of operation to assure immediate response to field conditions and proper monitoring of services.

Communication will be accomplished with the following tools:

Telephone System

Transportation Concepts will utilize a comprehensive Panasonic telephone system with a minimum of 4 lines to include the public telephone numbers and a direct business line.



Internet Access and E-mail

TC will ensure internet and networking capabilities as well as e-mail access. We will provide all necessary computer hardware and software to effectively operate service and support the communications needs of the Monterey Park Spirit Bus Service. The office staff and maintenance staff will utilize the Microsoft Office Professional Package in this location.

Radio System

Transportation Concepts is proposing a state of the art radio system. This system will allow thorough and detailed communication to the drivers in real time without compromising safety.

The base is a Motorola CDM155OLS 450-520 MHZ, 25 Watt 16 channel which will provide clearer voice communications along with static and noise rejection. Vehicles will be equipped with a Vertex VX-2200U LTR Mobile Radio also 450-520 MHZ, 50 Watts, and 128 channels with a 3 year factory warranty. This is a brand new model designed for expanded coverage and no interference. In addition to the dispatch



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office, our supervisor will be in consistent communication with vehicle Operators.

Recordkeeping

Transportation Concepts complies with all State and Federal labor regulations and record keeping requirements. Additionally, Transportation Concepts is intimately familiar with FTA Uniform Accounting and Reporting System of Accounts and with the National Transit Database Reporting (NTD) as it is a required reporting component of most all of the contracts we operate. We believe that modern transportation management demands state-of-the-art reporting and information management systems. Knowledge is power, and it is our goal in every contract, to arm our customers with as much knowledge as possible, so that they may make the best decisions based on the most accurate information.

We will provide customized reports that meet with the City of Monterey Park reporting requirements. All reporting documents will be produced accurately and in a timely manner on a monthly, quarterly and annual basis as required. Marvin Williams, the Project Manager will complete and review all reports prior to submission.

All reports will be provided in Microsoft Excel or Microsoft Word format. Report information will be tracked daily from the daily driver trip sheets transposed into a working electronic report. All daily information will be available to the City of Monterey Park upon request.

Daily operations and Operator staffing information will be maintained in a Microsoft database that can be available upon request. The database will contain master lists of operating days, Operators, trips, routes, revenue vehicles and event codes. These tables will be used to provide data-entry control and the generation of reports keyed to a variety of control parameters.

Monthly reports will be provided with the monthly invoice via email and hard copy no later than ten working days after the end of each month.

Vehicle Fleet Maintenance Plan

In order to maintain this fleet in a timely, safe, and effective manner, Transportation Concepts is proposing a maintenance partnership with Penske. Penske is a highly qualified fleet maintenance provider with excellent credentials.

Penske Overview

Penske Truck Leasing was formed in 1969, when Roger Penske purchased MM Waterbor, Inc, a small metropolitan truck leasing company with annual revenues that year of \$1.2 million in Reading, Pennsylvania. By 1982, revenues had grown to \$40 million.

In 1982, Penske Truck Leasing formed a joint venture with The Hertz Corporation. Hertz Penske Truck Leasing anticipated growth and a national trend toward consolidation in the truck rental and leasing industry.

In 1988, the company purchased the Hertz ownership and formed a new partnership with General Electric Capital Corporation by consolidating its GELCO Truck Leasing operations and Penske Truck Leasing. In 1995, annualized revenues exceeded \$1.6 billion. Penske remains the general partner and in 1996, General Electric increased their equity and is now a 79% limited partner in the business.

Penske Truck Leasing's acquisition in May of 1995 was Leaseway Transportation Corporation, consisting of two major product groups: Leaseway Automotive Carriage and Leaseway Logistics. Leaseway Automotive Carriage operates in excess of 1,440 automobile and light truck carriers servicing the manufacturers of domestic and imported vehicles. The specialized equipment used in this sector brought Penske added expertise in the maintenance and operation of hydraulic equipment.

In September 2000, Penske acquired Rentway, Ltd., a truck rental and leasing company based in Mississauga, Ontario. Rentway added more than 10,000 vehicles and a network of 40 service facilities to Penske making us the largest leasing and maintenance company in Canada.

In February 2001, Penske Truck Leasing acquired Rollins Truck Leasing of Wilmington, Delaware. The acquisition of Rollins, the third largest truck leasing and rental company in the nation, bolstered Penske's vehicle base by an additional 53,000 vehicles as well as adding approximately 270 additional full-service maintenance facilities.

Today, Penske Truck Leasing employs approximately 18,000 people and operates a fleet in excess of 200,000 vehicles from approximately 1000 facilities. Annual revenue is in excess of \$5 billion.

Penske primary products are full service leasing, contract maintenance, and commercial and consumer rentals. Penske Logistics provides integrated and warehouse distribution center management, and Leaseway Auto Carriers supplies automotive carriage services.

Penske Truck Leasing is one of the nation's largest transportation companies with billions of miles of experience. Penske's Specialized Equipment Services department provides comprehensive fleet maintenance specifically to the transit, utility and municipal sectors. Their company is positioned for continued growth in the fleet maintenance, leasing, and logistics business.

Penske Contact Information:

Penske Truck Leasing Company, L.P.
Route 10 Green Hills
P.O. Box 563

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Reading, PA 19603
Russ Scaramastra - Vice President
Phone: 610-775-6153
Fax: 610-796-2985

References:

Tri-Met
4012 SE 17th Avenue
Portland, OR 97202
Tony Bryant – Director of Maintenance
503-962-4955

Penske maintains 210 paratransit buses and 15 sedans for Tri-Met of Portland, Oregon in a captive shop operation. Maintenance is performed at an on-site shop with dedicated technicians working on a multi-shift basis to perform the majority of the maintenance services during off-peak hours.

Tri-Met provides comprehensive transportation needs to the citizens of Portland and these buses play a key role in the transportation of the elderly and handicapped patrons Tri-Met serves. Penske was selected because of our expertise in preventive maintenance programs designed to prevent downtime and at the same time keep costs in line. Penske also was recognized for a very smooth transition from the previous vendor's operation and for the professional manner in retaining the existing workforce that was in place.

San Jose Airport
1661 Airport Blvd., Suite C-206
San Jose, CA 95110
Robert Lockhart – Director Landside Operations
408-277-5249

This Silicon Valley airport is a major thoroughfare for business travelers in the Northern California area. Penske supports the City of San Jose with 14 Gillig diesel low-floor buses and 20 CNG buses that provide passenger transportation between airport terminals, parking facilities, and the rental car center. All of these buses are under a Full Service Lease with Maintenance Contract.

The Full Service Lease concept provides great flexibility to the City of San Jose, as there was no need for immediate major capital expenditure to purchase their new fleet. The city could also select their bus operator independent of the procurement of the vehicles.

Port of Oakland
One Airport Drive, Box 45
Oakland, CA 94621
Lester Padilla – Airport Operations
510-466-7847

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Penske Truck Leasing performs Full Service Contract Maintenance on 20 Gillig 40' diesel buses serving the Oakland Airport. These units operate 24 hours a day, seven days a week transporting airport visitors between the terminal and the parking garage. The City of Oakland was looking for a dependable partner and chose to outsource with Penske when their fleet needs expanded in 1998.

Penske's Oakland District is responsible for the ongoing maintenance of this transit fleet. Additionally, the Port of Oakland chose GE Public Finance to provide low cost tax-exempt financing on the new equipment.

Monterey Park Fleet Maintenance Program

Penske has a fully equipped maintenance facility strategically located at 1500 S Greenwood Avenue in Montebello. The shop is open 6 days per week from 1:00 am to 11:00 pm. The majority of work on the Monterey Park fleet will normally be completed during non operating hours, which includes evenings and on Saturday.



This location is secure, paved, and well lighted. The building is zoned for this type of service, already equipped with an oil/water separator and more than sufficient electrical power. An wash rack system is currently installed on site.

The shop is fully equipped and operable with six drive in bays and a drive through service pit to accommodate all system vehicles. They currently employ 22 technicians at this location.

The facility and lot offer easy access for vehicles with a drive in bays. Running repair, parts and tire storage, and maintenance equipment storage will take place here. The shop has lifts and all necessary maintenance equipment in place.

Penske has mobile maintenance trucks at the Montebello location that can be dispatched and to the service area in minutes if necessary for emergency maintenance report. We anticipate a maximum response time of 20 minutes. The repair time is contingent upon the issue at hand. In the event of a vehicle break down that can not be repaired utilizing the mobile maintenance truck, the vehicle will be taken either driven (if drivable) or towed to the Montebello facility for immediate diagnosis and repair. Penske will have a minimum of two Technicians assigned to the City of Monterey Park fleet during the Spirit operating hours so that fleet maintenance and repair will take priority. Routine maintenance will be completed within a twenty-four hour period.

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Penske's District Manager, Mr. Jerry Perez will be responsible for the coordination with TC for the City of Monterey Park fleet. Jerry has over 15 years of fleet maintenance experience and is familiar with CNG equipment. He will be located at the Montebello location. A resume for Jerry Perez is included in Section E of this proposal.

Penske employees are backed by a team of technical specialists and managers who are available to them to advise and assist them in the operation of their maintenance operations when unusual situations occur or during the startup of a new shop. District Service Managers can depend on the assistance of their Area Maintenance Managers along with Milton Jenkins, TC's Director of Maintenance from our corporate support team.

The combined years of experience, implementation of industry best practices and cumulative expertise that Penske brings to each of its shops and extends to all of its managers is unparalleled in the industry.

Routine Maintenance

Penske will perform all engine, chassis, and body preventive maintenance as recommended by the manufacturer, to include fluid exchange, component replacement, lubrication, inspection points, and services. Penske will use the manufacturers' specified replacement parts, oils, and lubricants specified for each vehicle type.

Effective PM management targets the elimination of down time due to unscheduled repairs. PM services that focus on preventing failures are a key element of Penske's PM regimen. Specific tests, such as oil analysis to detect contaminants, can predict component and system failures before they happen. These tests allow our technicians to make adjustments and/or repairs that, if left untreated, may require on-the-road assistance later.

Equally important, our ability to track and analyze our PM program's effectiveness through Penske's MyFleetAtPenske.com maintenance management system will enable us to implement an optimal maintenance schedule for the PVPTA. Our focus is to minimize downtime and prolong the life of the bus components by anticipating, diagnosing and repairing components and systems prior to failure. In essence, Penske adheres to a proven practice of predictive maintenance.

Penske will provide laboratory engine oil analysis and transmission oil analysis on every PVPTA-provided vehicle. Reports of the analysis will be made to the PVPTA and kept in the vehicles electronic and hardcopy file.

Preventative Maintenance Scheduling

Our team will work closely with the Penske fleet manager and operators to provide convenient advance scheduling for all work to be performed under this RFP. Penske will track each vehicle's PM and repair history electronically so that the PM schedule is

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generated automatically by the system. Using this method, we can issue 30-day advance notices to the fleet manager for all PMs coming due, thereby preventing missed or delayed PMs.

Vehicle Safety and Emissions Inspections

The Penske team conducts full safety and regulatory inspections of all vehicles and operating equipment as required. All federal, state and local criteria will be met or exceeded.

Penske makes safety-related inspections and repairs a priority. All vehicle safety and emissions inspections are tracked through MyFleetAtPenske.com to provide a permanent, complete record of compliance.

Road Calls and Towing

We will contact the Penske maintenance facility for emergency service during all operating hours. Since the shop is open from 1 am to 11pm 6 days per week, they will always be available to assist during the operating hours of the Monterey Park Spirit service.

When a call is received, the service coordinator logs the time, date, caller identity and type of emergency into an electronic file. This file remains open until the situation is resolved. It is updated in real-time with specific information on the time and type of service provided.

Minor Repairs and Fluid Services

Penske provides a quick fix service for minor repairs and maintenance service for all vehicles covered under this contract during normal hours of operation. Quick fixes are limited to repairs and service that can be accomplished in less than an hour. Such services include such items as wiper blade replacement, fuse and light bulb replacements, topping off of fluids, and checking tire inflation.

Warranty and Recall Work

Penske performs comprehensive warranty work and administration for all vehicle and equipment types. Penske does not limit its recovery efforts to the OEM. They have in place warranty recovery programs with many component and specialized equipment manufacturers. All warranted repairs, without regard to dollar amount, will be submitted for reimbursement. Additionally, policy adjustments or out-of-warranty claims will be aggressively pursued.

Penske will acquire all necessary technical service bulletins as required to properly service the City of Monterey Park vehicle fleet.

Road Testing

Penske road tests all vehicles that have had repairs. Road testing is especially important when repairs or adjustments to safety-related assemblies, such as brake systems, wheelchair apparatus or aerial lifts have been made.

Investigations and Audits

Penske will process all documentation required by state and federal DOT regulations, and directly handle any audit of the fleet maintenance records. In addition, we will provide support in the technical investigation of incidents, such as fire, accidents, or other issues of a technical nature.

Management Information System

Penske has an automated vehicle maintenance software MyFleetAtPenske.com and PartsNet systems in place at the proposed location. These systems are accessed online through Penske's intranet and are firewall protected and password secured. Penske's MyFleetAtPenske.com and PartsNet systems are proprietary systems that, working together, manage parts inventory in conjunction with maintenance service records.

Penske's in-house IT department maintains the MyFleetAtPenske.com and PartsNet programs and downloads upgrades to the software via the intranet. No on-site software maintenance is required.

MyFleetAtPenske.com

MyFleetAtPenske.com is Penske's proprietary maintenance management system that they have installed and run in every Penske shop across the nation. It has evolved over the years to become the cornerstone of our operations, directing work schedules, tracking service and storing the historical fleet/service data.

We highly recommend that the review team visit the local facility in Montebello for a demonstration of this system to see how service is scheduled and the system tracks work in the shop, can recall a vehicles repair history and generate management reports. Penske uses MyFleetAtPenske.com to schedule, track, and monitor all PM and repair activity. With its electronic database, our technicians can see the PM and repair history of each vehicle at the time of service, which enables us to spot recurring or related problems.

In addition to organizing and prioritizing fleet maintenance and repairs, MyFleetAtPenske.com records data on every technician's efficiency, vehicle repair and PM to monitor quality and timeliness.

Penske uses the data it collects in MyFleetAtPenske.com in a number of ways — to maintain productivity levels, to identify additional training needs for individuals and to evaluate tooling levels.

Each Penske repair order recaps the following information:

- Vehicle number
- All labor costs
- All parts used for the repair
- Any warranty claim that was filed
- Complete description of the work performed

Penske maintains both hard copy and electronic records on fleet maintenance and repairs.

Report Type	Description
APPLIED LABOR	Details all applied labor activity including job names and hours worked. The report can be sorted by job description, shop user, date, or shift. Additional selections are categorized by component code and whether to include shared jobs.
UNAPPLIED LABOR	Details unapplied labor activity, including job names and hours worked. The report can be sorted by job description, shop user, date, or shift. Additional selections are generated by a specific job description.
EFFICIENCY BY INDIVIDUAL	Details the percentage of efficiency for jobs with goal times and jobs without goal times. The report is sorted by selected dates, shop user(s), and shifts only.
UNAPPLIED LABOR BY WORK DAY (CHART)	Details, in a chart format, the unapplied labor activity by workday (Mon.-Sat.), including job names and hours worked only.
FINISHED WORK ORDER ANALYSIS (CHART)	Details, in a chart format, all Finished ROs by workday (Mon-Sat), including those vehicle jobs that are 100% complete, those that are clean, and those that are delivered when promised. The report is sorted by selected dates only. You can also view any exceptions by clicking the View Exceptions button.
PAID HOURS	Details the paid hours, by applied, unapplied, accounted, and unaccounted time. The report is sorted by selected dates, shop user(s), and shifts only.

Report Type	Description
STANDARD VS. ACTUAL EXCEPTIONS	Details the number of applied labor jobs that exceeded the set goal time, for a specified time period. The report is sorted by selected dates only.
SCORECARD	Details all information gathered from the reports, into a one-page synopsis.

MyFleetAtPenske.com maintains the following data and information:

- Work orders
- Assets and equipment
- Technician productivity and performance
- Inspection of assets and equipment
- Issue of stock or parts inventory
- Vendors and suppliers
- Fleet assets
- Preventive maintenance scheduling

MyFleetAtPenske.com software and hardware is proprietary to Penske. Upon termination of the contract all MyFleetAtPenske.com data will be provided to the the City of Monterey Park in both hardcopy and as an ASCII file.

PartsNetSM

Penske's PartsNet inventory management system uses bar coding to track each part from the time it enters the system until it is used for vehicle repair or maintenance or otherwise disposed of. A master file of all parts in inventory throughout Penske maintenance facilities is managed by associates dedicated to this task at our corporate headquarters in Green Hills, PA. Technicians will have a discrete local catalog of the parts that are stocked at our Ceres location. However, technicians will also have the ability to search Penske's National Catalog of parts to locate parts that may be needed, but are unavailable at the shop.

Below is a sample of what is included in a Penske bar code label.

- Supplier part number and description at top
- Item barcode number
- Stocking location (Parts Room section 018, bin 035)
- Date purchased
- Delivery reference number
- Manufacturer's part number

To aid the technician in locating the correct part, PartsNet can search the local or national parts database using multiple filter options. Additionally, parts are cross-

referenced to the suppliers/manufacturers part number to aid in locating the right part as quickly as possible.

Maintaining and reordering inventory is greatly simplified using PartsNet, as the system will advise users when parts inventory is low and what quantity to reorder. These thresholds are entered into the system during the transition and startup phase of operations. As new items are added, the parts database is updated to set inventory levels and reorder quantities. Managers can initiate a purchase order for parts from PartsNet, which adds efficiency to parts operations and reduces the possibility that parts will not be reordered in a timely manner. Having the parts to complete repairs is essential to maintaining fleet availability.

In the Inventory Quantity column there are alert blocks that indicate the level of inventory. Red is critically low/depleted, yellow indicates minimum number in inventory, and green (not shown on a reorder screen) indicates adequate inventory levels.

By using barcodes, there are fewer keying errors on repair orders, which in turn ensures the correct part number and price are applied to the repair order. The accuracy of the repair order information also helps facilitate processing of warranty claims with the supplier.

An accurate inventory count, meticulous record keeping and usage assignment are essential to running an efficient maintenance shop. Penske's integrated service management and inventory management systems build accuracy, efficiency and greater cost control into our shop management. Penske can provide the management systems that assure the City of Monterey Park and TC accountability.

Driver Inspections

Penske has developed a Drivers Vehicle Inspection Report for bus, tractor/trailer and straight truck drivers. This form is in compliance with the Federal Motor Carrier Safety regulation 396.11, which requires driver inspection reports for these types of vehicles.

As part of Penske's training offered to customers, they will work with TC to train our drivers to perform these pre-trip inspections and provide aids to the drivers to "walk them through" the process.

Waste Disposal

Penske will be responsible for disposing all trash and other wastes, including waste oil, generated during the course of the contract. We are committed to actively protecting the environment. Our employees working with and handling hazardous materials are provided with training and management oversight to ensure their actions are conducted in accordance with current City of Monterey Park requirements, state, and federal laws and regulations.

Penske's environmental department is staffed with four full-time professionals and two support personnel. This department, as well as every Penske employee, is dedicated to protecting the environment. As part of the environmental team, Penske employs a specialist whose job it is to arrange sampling, testing and disposal of wastewater sludge, track discharge permits, and to ensure discharges are in compliance. They will comply with all Hazardous Materials Codes including the permitting and inspection process.

Additionally, it is Penske's policy to recycle all used tires and air conditioner refrigerants. When disposing of material generated at one of its facilities, Penske handles the waste stream properly and professionally. Specifically, they use only national vendors who are authorized to transport and dispose of used oil, parts cleaning solvents and spent lead acid batteries. Their vendors are selected based on their commitment to protect the environment and their compliance history.

Each Penske-managed facility maintains all applicable records for all waste streams generated by the vehicles they service. MSDS sheets for all of the items used in the shop operations are also kept at each facility.

Penske will obtain the permits required to handle and dispose of waste materials and will be responsible for compliance with the terms, conditions and requirement of such permits.

Quality Programs

Penske is dedicated to a formal improvement process called Dedication to Excellence. Their philosophy of continuous improvement is intended to set the tone for relationships with our customers, employees and suppliers. Like TC, they understand that to continue to succeed, they must build on their strengths to produce a positive experience for their customers.

To drive their company toward continuous improvement, Penske has in place programs to monitor and improve the process both within the organization and with their customers.

Voice of the Customer

This program measures satisfaction with each customer at every customer location twice a year. The process provides Penske with performance information on all key aspects of the services we are providing. From this they can identify areas that customers appreciate, as well as, where they can improve.

Maintenance Effectiveness Process (MEP)

This program measures a technician's performance against established goal standards on a per-job basis. Penske provides every technician a written annual review of their overall performance. Additionally, each shop audits preventive maintenance inspections for quality and cost effectiveness on a weekly basis. Continuous monitoring of their processes enables Penske to implement corrective measures based on the program goals and the frequency of repeat repairs.

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District Team Meetings

A district team meeting is a monthly gathering of all district employees to review company and district performance, identify opportunities for improvement, provide a forum to share ideas, and to recognize individual and group achievement. The overall goal of this process is to improve Penske intra-organizational communication and performance.

GE Quality Perspective

As part of the GE family of businesses, Penske Truck Leasing has adopted the Six Sigma quality initiatives embraced by General Electric. Culturally their goal is to be nearly flawless in executing our key processes.

Six Sigma

Six Sigma is a structured process that Penske uses to work toward the development and delivery of near-perfect products and services. The Six Sigma process is based on the theory that by identifying and measuring defects in a process, you can systematically remedy each defect until the process is near perfect. Penske's customers are the core of their business. Using Six Sigma they look at their business from the customer's point of view so that they can examine the customer's experience and work to perfect the services provided.

The quality initiative has as its goal objective and unbiased measurement of their performance "in the eyes of the customer" on their customers' CTQ (Critical to Quality) issues. These measurements are taken regularly, and they use them to work toward continuous improvement through workout sessions with all customers.

Penske regularly performs audits of its PM inspections and the follow-up work done by their technicians. This practice ensures that quality PM inspections are done at all times and that the slightest slippage in performance can be corrected before adverse effects are seen in vehicle availability or performance. Penske service supervisors, branch managers and area maintenance managers perform the audits.

Vehicle Cleaning

The cleanliness of the vehicles that are used for the provision of transit service is an important indicator to the passengers of the quality of the service. The exterior and interior cleanliness of the vehicle is readily noticed by the passengers and contributes greatly to their perception of the service quality. Transportation Concepts will utilize both a full time in-house utility employee and an outside vendor to maintain the consistent cleanliness of the fleet. Vehicle exteriors will be washed a minimum of every other day at the Penske facility in Montebello, which is equipped with a fully functional wash rack system with a clarifier.

On a daily basis, all vehicles utilized in revenue service will have their interiors swept and wiped down. In addition, the wheels and inside of all windows will be cleaned, and scrubbing of oil or other excessive residue off the rear end; dusting or vacuuming of all

seats, dashboard, stanchions and exposed surfaces; and sweeping or vacuuming of all floor areas, including the removal of gum, grease, oil, etc will be performed weekly.

Although probably not a problem with the Monterey Park Spirit Bus Service, any graffiti, interior and exterior, that is cleanable will be removed daily. If any graffiti is obscene, or gang related, it will be removed immediately, or the vehicle shall not be used in revenue service until corrected. All seats will be dry when in revenue service. In order to mitigate this issue, TC has a zero tolerance policy for graffiti. The vehicle operator is expected to report the graffiti and the maintenance department will address it after the vehicle is out of service.

Transporation Concepts Quality Assurance Program

Transportation Concepts is intimately familiar with such expected standards and has demonstrated considerable success in achieving the performance standards as defined by each agency that we have worked with.

Our proposed team has extensive experience with the designated standards and is prepared to ensure performance excellence through the operation of the Monterey Park Spirit Bus Services.

TC will strive at all times to provide service in a manner which will ensure responsive service to transit customers, while at the same time maximize service reliability and safety. TC is committed to exceed expectations through the provision of quality service.

Specifically, the company and all of its employees will be dedicated to:

- Excellent provision of service
- Prompt and accurate reporting to the City of Monterey Park
- Prompt response to complaints and comments
- Consistent satisfactory CHP terminal inspections
- Consistent provision of safe and timely service to Monterey Park Spirit passengers
- Consistent operation of all vehicle systems, and
- Compliance with all operating procedures

Customer Complaint Resolution

It is the responsibility of the Project Manager to serve as our customer service representative, and work in partnership with the City of Monterey Park to resolve passenger complaints. Once Transportation Concepts has been made aware of a complaint, either, through City staff, or, by the passenger directly, the Project Manager will initiate an investigation. Transportation Concepts will respond back to the passenger within twenty-four to forty-eight hours, specifically disclosing the action taken related to a valid complaint, or recommended actions if it is an invalid complaint. The key to the effective handling of all passenger complaints is to be proactive and to provide specialized customer service training. It is critical that the entire Spirit Service team

Proposal –Operation and Maintenance of the Spirit Bus Service



focuses its efforts toward the goal to consistently meet or exceed passengers' expectations of the service. TC looks at feedback from complaints as a valuable tool that permits us to measure our success toward attainment of our quality goals.

Policies and Procedures

TRANSPORTATION CONCEPTS SEEKS TO RAISE EMPLOYEE AWARENESS REGARDING THE IMPORTANCE OF QUALITY CUSTOMER SERVICE.
OUR POLICY IS DESIGNED TO IMPROVE SERVICE QUALITY, ENERGIZE AND MOTIVATE EMPLOYEES AND BOOST PASSENGER SATISFACTION!

Transportation Concepts' policy is to consistently strive to ensure that quality service is provided in the operation of the City's services. Here are some of the methods we utilize to ensure quality control and a higher level of customer service than that of other transportation providers:

Advanced Customer Service Training



The Company's expectations are clearly articulated to all employees constantly. The company's primary objectives are to provide safe, courteous, professional and dependable service to every customer. Knowledge of these objectives is reinforced in training. Safety, attitude, on-time performance, customer relations, effective communication, and appearance are all stressed as being our major focal points. On an ongoing basis, the company reinforces that our role is to serve our customers. Transportation Concepts infiltrates the idea that our goal is to deliver exceptional customer service in all areas of our business. Our customers should experience customer satisfaction upon every interaction with any representative of our organization. Our program incorporates the following principles:

- **Teaching importance of excellent customer service**
- **Developing the operators professional image**
- **Establishing positive relationships with customers**

Each employee is required to review customer service principles and implement simple methods to ensure that they are projecting a positive image and providing a pleasant experience for those they come in contact with on a daily basis. The customer service theme is common throughout our proposal. We continuously strive for customer service excellence and provide tools to our employees so that they can deliver exceptional customer service. Our objectives for the program are described below:

- **Understand who your customer is**
- **Define exceptional customer service for that individual (riding passenger, caller asking for information, caller requesting a ride, etc.**
- **Identify the benefits of great customer service.**
- **Recognize barriers to the delivery of outstanding customer service.**

- **Demonstrate how to measure customer satisfaction levels and take corrective action if needed.**
- **Learn techniques for dealing with angry or upset customers.**
- **Develop a personal action plan to improve customer service skills.**

Each employee will be coached on the value of effective communication and understanding that everyone communicates differently. Maintaining composure and kindness may be difficult sometimes but in the end, it always pays off. The lesson "***it's not what you say but how you say it***" is one that takes some people years to learn. Our employees will be coached on how to use language to its best advantage during customer interactions. Special emphasis is placed on learning to say "no" in ways that reduce conflict and eliminating phrases such as, "that's not my job," and "I don't know."

Not all customers are easy to deal with. However, realizing that there are times when the attitude they come on the bus with or call on the telephone with has nothing to do with the person on the receiving end. Using case studies from other transit operations, participants will learn in this discussion how to effectively interact with angry or complaining customers.

Transportation Concepts' primary goal is to deliver exceptional customer service. If we are fulfilling all of our contractual obligations, we should have extremely satisfied customers that experience a pleasant, safe, and timely ride, as well as expedience and professionalism if they call in need of system information. Such concepts are a significant part of our day at Transportation Concepts. We emphasize the importance of these concepts and how they can assist in and out of the workplace. Our customer service philosophy will continue to emphasize that this is the responsibility of each employee, and will include the following:

Professional Attitude

Wear specified uniforms that are clean and maintained. Be well groomed and ready to work at designated times and positions. Be calm, energetic, pleasant and polite. Smile, make eye contact, and be committed to excellence.

Superior Customer Service

Go out of your way to meet customer needs, providing personalized service when appropriate. Work as an effective team member with an enthusiastic attitude. Be able to take direction with minimal supervision.

Effective Communication

Speak clearly and in a friendly tone of voice. Ask questions to clarify customer's understanding, and assist any special needs passengers. Seek bilingual assistance when necessary. Be an active listener and demonstrate attentiveness and sincerity.

Problem Solving

Handle and resolve difficult situations promptly. Be discrete, apologize to the customer or driver, and suggest solutions. Remain calm and notify a supervisor when necessary

to keep a situation from escalating. Be a pro-active problem solver and anticipate potential issues.

QA Inspection Fundamentals

Monitoring by Project Manager and Operation Supervisors

On street monitoring consists of road observations and unobserved checks. Road observations are unscheduled checks designed to monitor on-time performance, vehicle cleanliness, and safe and courteous driving. The goal is to achieve 100 percent system on-time performance.



Vehicle and Driver Appearance

The cleanliness of the vehicles that are used for the provision of transit service is an important indicator to the passengers of the quality of the service. Vehicle cleanliness will be monitored daily via rollout inspection by our supervisor. On a daily basis, all vehicles utilized in revenue service will be swept and wiped down. A minimum of every other day, our wash crew will perform washing and scrubbing of the full exterior, wheels, area, inside of all windows, scrubbing of oil or other excessive residue off the rear end; dusting or vacuuming of all seats, dashboard, stanchions and exposed surfaces; and sweeping or vacuuming of all floor areas, including the removal of gum, grease, oil, etc. All graffiti, interior and exterior, that is cleanable will be removed as soon as practicable. On a monthly basis the Project Manager will conduct both a roll out inspection of the fleet of vehicles to evaluate cleanliness, as well as inspect our Drivers to insure they are meeting expectations.



Transportation Concept's employee uniforms consist of dark blue slacks or shorts, light blue uniform shirts with Transportation Concepts embroidered logos, dark blue jacket, black shoes and an employee identification tag, worn at all times on the front pocket area of the uniform shirt of jacket. Each employee will be required to be in full uniform at all times while in performance of their duties. Uniforms will always be clean, free of spots, and pressed, and consistent with City of Monterey Park requirements.



Utilization of Surveys

Our Passengers



Since TC began contract services we have implemented simple passenger surveys on selected trips during specific periods throughout the year. The information received from these surveys can help to measure the riders' level of satisfaction.

Our Employees



Effective proactive relationships with employees are necessary to establish a mutual level of confidence and respect. Interpersonal communication that is open and honest is a necessary ingredient in order to form a trusting relationship. We have found that making our employees feel valued through the active participation of an employee survey is a strong motivator, which can help to heighten performance levels. We conduct employee surveys annually at each of our locations.

Our Client (Monterey Park Contract Administrator)



Receiving clear and honest feedback from our clients provides our organization with an additional tool to ensure we are on track towards our goal of 100% satisfaction. Mr. Rich Rogers, our Chief Operating Officer, conducts the survey on an annual basis. The survey is designed to provide feedback in both a quantitative and qualitative manner. Results of this survey will be shared with the General Manager and her staff. Any area not exceeding expectations is collectively discussed with a follow up action plan designed to bring about any needed improvements.

Quality Assurance and Survey Forms

The following are examples of sample quality assurance and survey forms that Transportation Concepts would utilize in the operation and maintenance of the Spirit Service. They are utilized as follows:

Type of Form	Frequency of Use
Client Feedback Survey	Annual
Employee Survey	Annual
Quality Assurance Audit	Annual
Sample Passenger Survey	As Requested by Client
Maintenance Audit	Weekly
Roll out Inspection	Monthly
Driver Performance Evaluation	Annual
Driver Ride Check Evaluation	Quarterly
Driver Unobserved Road Check	Daily

QA Documentation, Review and Reporting

The key to maintaining high quality service is to establish performance standards, communicated such standards to those expected to carry out such standards, and consistently monitor performance. The local management team is responsible for educating all employees as to expectations, and system goals. Goals are established based on contract requirements and generally accepted practices. Together as a team, we will work to achieve these goals.



Proposal –Operation and Maintenance of the Spirit Bus Service



Each employee has a specific job to do in order to ensure superior service quality. The Project Manager will consistently monitor driver performance through observation, system statistics review, and regular attention to system commendations and complaints. On-street operational quality assurance is monitored through the manager and supervisor.

Not only does our performance monitoring system provide us valuable information, but it also serves as continual improvement system. Our goal at Transportation Concepts is to provide well-structured management information to facilitate good decision-making, to support decisions with proper data, and to demonstrate positive results.

Reports will be generated from the database that will spot problematic systems, repeat repairs, problem operators, problem buses and miles between road calls for each vehicle. The management information system reports are customized to each system operated and becomes an intricate part of our monthly management report.

Management reviews each report and compares the statistics to other locations and compares the data to the locations history to look for trends. The trend analyses serve many functions. It gives us feedback on our operational and maintenance programs to ensure timeliness and quality. We monitor key performance indicator (KPI) variances, personnel levels, training and productivity. These benchmarks are used to encourage the manager to report real numbers so we can send the corporate support necessary to correct any deficiencies identified.

We believe that continuously tracking and monitoring data will result in tighter operational controls, useful information for future operations and exceeding customer expectations. Any variance or system aberration can be easily identified and followed up on.

All system records will always be available for review by City Staff during the term of our agreement. Additionally, these documents are stored for a three year period following the conclusion of our contract.

H. MAINTENANCE AND STORAGE FACILITIES

Transportation Concepts is proposing to store and maintain the Monterey Park Spirit vehicles from the Penske Fleet Maintenance facility located at 1500 S. Greenwood Ave, Montebello. This facility is less than 5 miles to the City of Monterey Park border (60 freeway) and less just 6.7 miles away from Monterey Park City Hall. The storage area on the property is paved, well lighted and secured with gates and fencing. The Maintenance building consists of 6 drive in shop bays, a drive through pit and wash rack. This facility meets all environmental and regulatory requirements and, has been in use for several years.



In addition, we will have the use of office space adjacent to the bus parking/storage area. We will have a managers office, supervisory area, employee area as well as restrooms available.



I. CONTRACTOR PROVIDED BACK-UP VEHICLES

Monterey Park Spirit Revenue Fleet – See Next Page for Photos and Detailed components

- A commitment to purchase a new and dedicated 2019 CNG Starcraft Allstar XL 32" transit bus as a spare to the existing fleet
- Furthermore a commitment to procure and install a the REI Buswatch Camera system for the entire Transit fleet as well as the purchase and installation of an Annunciator system along with the Hanover LED signs so that the entire Monterey Park Spirit fleet will have the same front and rear LED signage, will provide a unified Annunciator system and will have Next bus technically so that users within the community to identify exactly where the Monterey Spirit equipment is on route at an time and allow real-time accessibility for on time performance along each and every bus stop

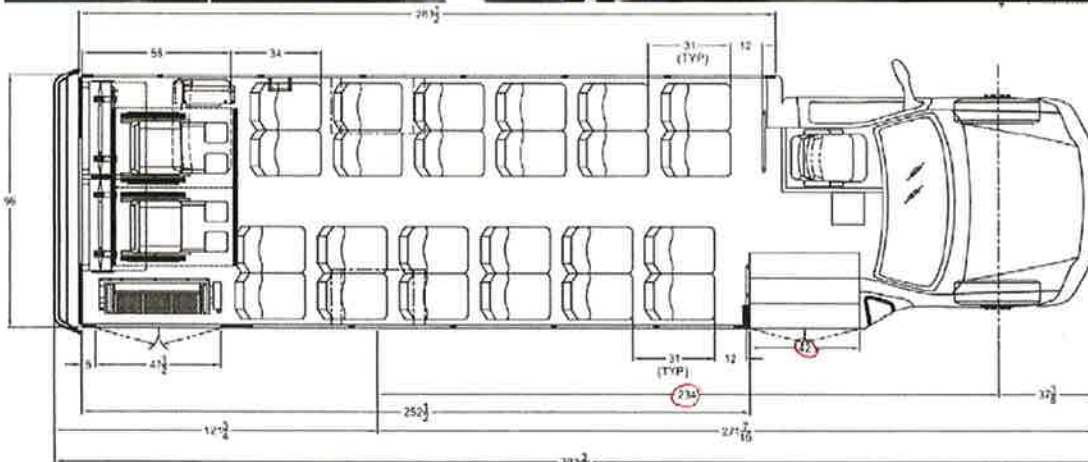
TC Support Vehicles

Transportation Concepts is proposing to one (1) additional support sedan for driver relief and (1) sedan for field supervision.



Creative Bus Sales

4/30/2019 Transportation Concepts (City of Monterey Park)



2019 STARCRAFT ALLSTAR XL 32' TRANSIT BUS

- 30 SEATED PASSENGERS OR
- 28 + 1 WHEELCHAIR OR
- 24 + 2 WHEELCHAIRS

FORD F550 XL CHASSIS WITH 19,500LB. GVWR
6.8L V10 52GGE CNG CONVERSION
5 SPEED AUTOMATIC TRANSMISSION

TILT STEERING WHEEL
 MOR-RYDE COMFORT RIDE REAR SUSPENSION
 GERFLOR SIRIUS FLOORING W/YELLOW STEP NOSING
 - FLOOR COLOR: ANTHRACITE (GREY)
TA77R90 SUPER 13 87,000 BTU A/C WITH ROOF MOUNTED CONDENSOR
HOT WATER HEATER, 65K BTU
 PRIORITY SEATING SIGN
 STARCRAFT CIRCUIT BOARD LIFT INTERLOCK
 BACK-UP ALARM SAE TYPE C 97 DBA
 CEILING GRAB RAIL (2)
 1 1/4" GRAB RAIL PARALLEL TO ENTRANCE STEPS (BOTH SIDES)
 MID HIGH DOUBLE SEAT (12)
 ANTI-VANDAL GRAB HANDLE, BLACK (13)
 - AISLE SIDE ONLY
 SEAT BELT, NON-RETRACTABLE (30)
 SEAT BELT LOOP - (30)
 DELUXE AM/FM / CD /WITH MIC INPUT & CLOCK, 4 SPEAKERS
 PA MODULE ADDED TO STEREO SYSTEM
 ADDITIONAL SPEAKER (2)
 - MOUNT TWO OF THE SPEAKERS IN FRONT BULKHEAD
 PADDED VINYL INTERIOR (WALLS AND CEILING)
 SEAT COVER - LEVEL 1 NEWPORT VINYL; OXEN VINYL; OLEFIN
 FLIP SEAT, DOUBLE FREEDMAN FEATHERWEIGHT MID HIGH (2)
 FOLDAWAY DOUBLE FLIP SEAT (1)
 BRAUN CENTURY NCL 1,000LB WEIGHT RATING WITH 34" X 54" PLATFORM
 WHEELCHAIR DECAL (INTERNATIONAL SYMBOL OF ACCESSIBILITY)
 Q-8301-L MAX RETRACTOR TIE DOWN, Q8-6326-A1 COMB LAP/SHLDR, L TRK (2)
 DOUBLE WHEELCHAIR DOORS W/ WINDOWS, INTERIOR LIGHT, LEAF SPRING
 LIFT COVER
 FORD RETAIL DISCOUNT
 FORD UPFIT DISCOUNT
 FORD MOBILITY DISCOUNT

PRICING

Unit Price FOB Elkhart, IN*

\$126,905.24

*Prices DO NOT include tax, license, DMV fees or options below.

OPTIONS

DIAMOND FAREBOX WITH STANDARD 2 VAULTS	\$1,110.00
HANOVER FRONT AND (1) SIDE DESTINATION SIGNS	\$4,505.60
AMEREX FIRE SUPPRESSION SYSTEM	\$3,840.00
SPORTSWORKS 2 POSITION BIKE RACK	\$2,048.00
REI 1TB BUSWATCH DVR SYSTEM (4 CAMERA)	\$7,425.00
STOP REQUEST PULLCORD SYSTEM W/ ADA BUTTONS ON SEAT+CHIME	\$1,536.00
REI P/A SYSTEM	\$532.48
TWO WAY RADIO (N/A. QUOTE SEPARATE PER CUSTOMER REQUIREMENTS)	N/A
TOTAL	\$20,997.08

► The Allstar XL Series

Ford F550 Chassis

STARCRAFT BUS
a division of Forest River, Inc.

► Standard Exterior Feature Highlights

- 96" wide exterior body
- Fully welded steel cage construction meeting all applicable FMVSS requirements
- "Starview" drivers visibility window in front of entry door
- Electric actuated passenger entry door with full length glass
- 36" wide x 36" high upper double T-Slider tempered safety glass windows with climate control tint
- Black powder coated steel rear bumper
- Rear mud flaps
- Pre-painted white aluminum side walls and skirts
- Fiberglass front and rear caps
- One-piece seamless FRP (fiberglass reinforced plastic) roof
- Breakaway rearview mirrors with convex
- Sealed LED stop, tail, and turn signal lights with incandescent reverse lights
- Exterior graphics package available in three colors (blue, green or burgundy)

► Standard Interior Feature Highlights

- 80" interior floor to ceiling height
- Floor and wall seat track for flexible seating
- Black slip resistant floor covering
- White step nosing at passenger entry door
- 5/8" exterior grade plywood flooring
- Ceiling and rear wall fabric for sound abatement
- FRP (fiberglass reinforced plastic) sidewalls for ease of cleaning
- White step nosing
- 1.25" left hand vertical passenger assist rail at entry door
- Printed circuit board with automotive type fuses and LED trouble shooting lights
- Entry door step well lights
- Incandescent driver and passenger area lighting
- Non-retractable seat belts

► Popular Option Highlights

- Stainless steel wheel inserts
- Interior and exterior LED lighting
- Luggage storage areas (overhead luggage racks with reading lights, interior luggage racks, rear storage area)
- Rear emergency door with window(s)
- Passenger area rear heat and air conditioning
- Complete rubber flooring
- Passenger grab rails
- Padded vinyl or cloth walls and ceiling
- Audio and video systems
- Mid back or high back seating
- ADA and FMVSS compliant wheel chair lifts and securement systems



24 Passenger Plus 2 Wheelchair
4 Passenger Flip Seats Plus Driver



24 Passenger Plus 2 Wheelchair
4 Passenger Foldaway Seats Plus Driver



24 Passenger with Rear Luggage Plus Driver



28 Passenger with Rear Luggage Plus Driver



29 Passenger Plus Driver



32 Passenger Plus Driver



Due to our commitment to product quality, specifications and options are subject to change without notice in the interest of product improvement and market changes.

► The Allstar XL Series

Ford F550 Chassis

STARCRAFT BUS
a division of Forest River, Inc.



Creative Bus Sales
800.326.2877
CreativeBusSales.com



Creative Bus Sales 800.326.2877 **CreativeBusSales.com**

► **Designed for Performance**

► The Allstar XL Series

Ford F550 Chassis

Designed for Performance

STARCRAFT BUS
a division of Forest River, Inc.



► Performance is not measured by how fast the bus will go, but rather by its passenger comfort and protection. The Allstar XL with its rock-solid, steel cage frame utilizes the same construction as the time-tested Allstar, offering passengers the best protection possible. Built on Ford's F550 chassis, the XL utilizes straight side wall construction and features a wide aisle to maximize shoulder space, giving your passengers the comfort they expect and deserve.

The Allstar XL is designed to accommodate a variety of seating arrangements including wheelchair accessibility and various storage options for luggage. The XL's chassis features proven gas and diesel engines built by Ford, which is known for quality and reliability over the long haul. Choose the Allstar XL... because performance matters.

Starcraft Bus, a division of Forest River, Inc. is owned by Berkshire Hathaway, one of the most respected and secure companies in the industry.



► Allstar XL Features

Features to Meet Your Specific Needs



Spacious interior with high-back seats and overhead luggage racks.



Conveniently located switches and easily-accessible driver's area.



Stylish fiberglass rear cap with rear luggage access door.



Optional mid-back seats, padded vinyl walls and ceiling, and wheelchair accessible.



Printed electrical circuit board with LED trouble-shooting lights.



Optional ADA wheelchair lift mounted in the rear of the bus.





City Council Staff Report

DATE: May 15, 2019

AGENDA ITEM NO: New Business
Agenda Item 5-C

TO: The Honorable Mayor and City Council
FROM: Mark A. McAvoy, Director of Public Works/City Engineer
SUBJECT: Approval of Monterey Park Mobility Program Plan

RECOMMENDATION:

It is recommended that the City Council:

1. Provide direction to staff regarding the City's Transit Programs;
2. Approve Monterey Park Mobility Program Plan; and
3. Take such additional, related, action that may be desirable.

EXECUTIVE SUMMARY:

The City Council directed staff to draft and present a mobility program plan for the City Council's consideration. This report includes a proposal and preliminary cost analysis of a mobility program for Monterey Park. Staff recommends the City Council approve a mobility program plan and provide direction on how to proceed with future Spirit Bus services.

BACKGROUND:

The City's current contract with First Transit to operate and maintain the Spirit Bus will expire on June 30, 2019. At the March 20, 2019 City Council meeting, the City Council authorized staff to issue a RFP for the Spirit Bus contract, and at the same time, look into a feasible mobility program that would work for the City. A proposal of a potential mobility program plan is provided in this staff report.

Current Spirit Bus and Dial-A-Ride (DAR) Program Costs Analysis

Spirit Bus

The City of Monterey Park has established and provided transportation services for the community through our fixed-route transit system called Spirit Bus since 1989. The City uses the Proposition A (Prop A) and Proposition C (Prop C) Local Return allocation each year to fund the City's various transit programs. There are five routes that serve different areas of the City. In addition, the City operates a Metrolink shuttle during the morning and afternoon peak hours connecting the Metrolink stop at Cal State LA campus and East Los Angeles College. The hours of the program are Monday through

Friday from 6:30 a.m. to 6:30 p.m. and Saturdays from 9:10 a.m. to 5:45 p.m. The fixed-route buses do not operate on Sunday and major holidays. In addition to Spirit Bus, the City operates its own Dial-A-Ride and Dial-A-Taxi programs for seniors and for those with disabilities.

In May 2015, the City Council approved a 3-year agreement with First Transit to operate and maintain the Spirit Bus transit services. Managed by the City's Public Works Department, the annual contract amount with First Transit to provide the fixed-route transit services averages out to \$835,810 (based on a calculation of an average of 19,000 revenue hours per year). The total costs can be lower than the budgeted amount depending on overall ridership levels. For the passengers, the cost to ride the Spirit Bus is \$0.25 per trip for Routes 1 – 4 and \$0.50 for Route 5 and Metrolink shuttle. Children ride free. The fare also includes one free transfer to other Spirit Bus lines and Metro buses within the first 1.5 hours. In FY 17-18, the total operating costs for Spirit Bus was \$1,140,857 with a ridership of 259,067 passengers and a \$4.10 cost per passenger. Spirit Bus does not operate in the late evening, on Sundays, nor major holidays, limiting people's mobility to get around in town. Each Spirit Bus route runs a 45-minute loop. The average wait time is 10-15 minutes.

Dial-A-Ride (DAR)

The Dial-A-Ride (DAR) program is funded by Prop A Local Return funds and operated by the City's Recreation and Community Services Department. The City employs three full-time and one part-time DAR drivers, and deploys three DAR vehicles. In compliance with the Americans with Disabilities Act (ADA), DAR is a free shared transportation service for Monterey Park senior residents age 55 years or older and/or who have a signed form from a physician attesting to a disability that travels within City limits, except for medical appointments to adjacent communities in Alhambra, Montebello, San Gabriel and other unincorporated LA County areas. To schedule a ride, residents call the City's DAR dispatcher desk. However, medical appointments need to be made at least five days in advance and regular appointments need to be made at least three days in advance. It is on a first come, first served basis. The hours of operation are Monday to Friday, 8:30 a.m. to 4:00 p.m. The average wait time is 9 -15 minutes for the pick up to arrive. In FY 17-18, the total operating cost was \$494,787 with a ridership of 9,940 users and a cost of \$49.78 per ride. Note that of the 9,940 DAR users, 78% of them (7,776 riders, or just over three-quarters) did not have ADA-related needs.

In summary, it cost the City \$1,555,719 to operate the fixed-route transit and DAR program in FY 17-18, and preliminarily FY 18-19 appears to be similar. In the past, the City Council has raised some concerns related to our community transportation program:

1. Explore options to connect the Metro Gold Line Station, Potrero Grande area, and the MarketPlace to meeting the growing transportation needs

2. Provide a transit system that helps the community get around town easier to dine, shop, and play
3. Address increased traffic congestion on major corridors
4. Operate a transit model that reduces operational costs

These concerns, combined with the high cost of current operations for DAR and Spirit Bus, low Spirit Bus ridership, and an expiring Spirit Bus contract with First Transit, led staff to explore a more cost-effective, reliable and convenient transit model for our community. This was preliminarily discussed at the March 20, 2019 Council meeting and based on Council direction at that time, staff is returning with a discussion on the elements of a proposed program. Staff has tentatively labeled the new program the “MoveMPK Mobility Program.”

MoveMPK Mobility Program

There are a few key components to the proposed MoveMPK Mobility Program for the City Council’s consideration:

Partnering with a Ride-share Provider

The City partners with popular ride-share providers such as Lyft or Uber to provide all non-ADA-related calls for service on Monterey Park transit at a subsidized cost funded by Local Return allocation, including Prop A, Prop C, Measure M, and Measure R funds. For instance, the City of Monrovia's GoMonrovia Mobility Program currently utilizes Lyft to cover their local non-ADA-related transit needs. The wait time is five minutes or less on average. The subsidized cost to users is \$0.50 per ride to/from Old Town Monrovia and the Monrovia Gold Line Station. A shared Lyft ride (1-2 passengers) is \$1.00 per ride anywhere in the Monrovia service area (in essence, co-terminous with City boundaries with a couple exceptions) and a private Lyft ride (up to 4 passengers) is \$3.50 per ride. Users must be 18 years and above to use this service and need to download and install the Lyft app to create a personal account. All transactions are done via the app. GoMonrovia uses a special code for the discounted rate when ordering a Lyft with the app. Charges for the rides are charged at the end of each month, and a monthly receipt for the amount charged to the credit card on file is emailed to users. This on-demand model provides flexibility and convenience to users who can get around the City 24 hours a day and 7 days a week.

Staff recommends that for the MoveMPK program, a subsidized cost of \$1.00 per ride be utilized as a starting point.

Monrovia’s Lyft contract includes a Concierge Service term that allows third-party booking not using a smart phone. With the Concierge Service, DAR users can call into the call center to book a ride, receive pre-trip cost estimates, driver’s expected time of arrival and vehicle information. For those who have ADA-related needs the call will be

dispatched to DAR unit to dispatch an ADA accessible city vehicle for pick-up. This way, DAR service can be reserved for those who have ADA-related needs. In addition, beginning March 18, Monrovia started requiring pre-registration for those who use the Concierge service to cut back on abuse by underage riders who are using the Concierge service through the dial-in telephone number. This is something that Monterey Park can learn from if the City Council decided to partner with a ride-share company.

Modifying the City's DAR Program

Another option would be for the City to continue to operate its own DAR program but to revise the policy to serve those who have ADA-related needs only, thus unable to ride on ride-share vehicles through the MoveMPK program. It is recommended that those have proof of disability eligibility and 18 years or older can use the DAR service and pre-registration with the City is required. Staff also recommends that one or two city-owned buses, that are ADA accessible and equipped with wheelchair lifts, be used as shuttle vans for the DAR program. As mentioned above, the current DAR program has a high cost of \$49.78 per ride; therefore, shifting the DAR program to serve only those have ADA-related needs can reduce the operating costs. In addition, staff recommends that the City charges users \$0.50 per ride. According to our FY 17-18 DAR ridership data, 78% of the riders are non-ADA-related who can utilize the ride-share vehicles through the MoveMPK program. This means that the ride-share model offers a cost savings of 90% on a per ride basis. This "closed system" not only cuts down the operating cost estimated at \$338,800 per year (\$49.78 per ride vs. \$5.00 subsidized cost) but also reserves the DAR service for those with ADA needs. Since the DAR program is operated by the City, the hours of operation would stay the same from Monday to Friday, 8:30 a.m. to 4:00 p.m.

Partnering with SGVCOG's Bike Share Expansion Project

The City is one of the 15 participating cities in SGVCOG that is receiving a grant in the amount of \$4.55 million through California Transportation Commission to form a bike share program in the San Gabriel Valley. In February, the SGVCOG awarded Gotcha Media Holdings a contract to implement this bike share expansion project. The bike share equipment, infrastructure, ongoing operations/maintenance and program launch are at no cost to participating cities. Implementation of the system is expected to take place beginning in the Spring of 2019. It is expected that the system will launch in phases over the next months. The contractor will be responsible for site planning and installation of the system at public locations. Staff attended meeting with Gotcha and SGVCOG in April 2019. Cities have the option to operate a 3-year program or a 12-month pilot program (the option that we will likely select). Cities are responsible for installing either bike racks or other designating areas for bike stations at strategic locations. A draft agreement proposed by Gotcha is attached in this staff report.

Partnering with Metro Bike Share

The City could also consider partnering with Metro Bike Share that offers over 100 stations and 1,000 bikes in Los Angeles. Users must be at least 16 years old and have a TAP account with an associated credit card to use this program. To release a bike from the docks, use the TAP card or app to access mobile check-out. The bikes/docks in real time are available to be viewed with the app. A 30-day pass costs \$17. Metro offers reduced fare passes for seniors, people with disabilities, and students. With a Reduced Fare card, a 30-Day Pass costs \$5 and a 365-Day Pass costs \$50. Staff doesn't recommend this option, due to the bike share program being rolled out through SGVCOG's contract with Gotcha.

Partnering with Electric Scooter Rental Company

As an alternative or addition to a bikeshare program, the City can consider partnering with electric scooter rental providers such as LimeBike. Launched in 2017, LimeBike is one of the nation's leading dockless bikeshare providers and is currently operating in over 40 cities and universities across the country. Beginning March 15, the company is no longer operating their bikeshare program and moving on to electric scooter rental. Due to potential vandalism of scooters and business licensing requirements, Monrovia chose not to include the scooter program in GoMonrovia. The company cannot be reached for additional information by the time this staff report was submitted. Detailed information on the scooter rental program will be provided at future meeting upon City Council's request.

Adopting Ordinance to Regulate Bikeshare Services Operation in the City

In order to avoid unauthorized use or placement of bikes on City and private properties, staff recommends that the City Council consider adopting regulations to require certain permitting and licensing regulation on any bikeshare company for the use of city streets and public and private properties prior to operation in the City or placing bike racks and bikes on City property. With Council direction, staff would work with the City Attorney's office on drafting the ordinance for future Council consideration.

Partnering with Alhambra Unified School District

According to Spirit Bus contract operator First Transit, Spirit buses are mostly used during morning and afternoon peak hours by students, specifically, students from Mark Keppel High School. The City Council could consider partnering with Mark Keppel High School and utilize one or two of the city-owned buses to provide shuttle services for students during the morning and after-school commute. This option could reduce traffic congestion in the immediate area of the school, but also take care of the transportation needs of students who do not meet the age requirement to use a selected rideshare provider under the MoveMPK program. Staff could initiate conversations with the school district following Council's approval of this plan and bring this back at a future meeting.

Approving Costs Related to Successful Promotion and Implementation of MoveMPK

Appropriation of funds allocated to assist in the rollout and promotion of MoveMPK is necessary as part of a successful program implementation. Staff recommends the City Council consider hiring a marketing company to promote the MoveMPK program. Ideally, the marketing company works with all the partners in this program – the ride-share provider, bikeshare provider, and the City - in bringing a concerted effort in promoting and rolling out the program, including posting informational signage in and around the City and producing marketing materials to raise awareness of the program amongst residents, commuters, and visitors. The marketing costs are eligible to be paid out from the Air Quality Management District's AB 2766 funds. Using Monrovia's cost estimate, it will need approximately \$15,000 for producing and posting informational signage. The AB 2766 funds would be sufficient to cover these marketing costs.

Spirit Bus Program

As in every successful program implementation, staff would continue to refine the program once it is launched. The MoveMPK Program, if implemented well, would address the concerns the Council has raised over the years with respect to our community transportation program, transforming an inflexible fixed-route transit model to an affordable, faster and efficient model of transportation services for Monterey Park and our surrounding service area. Therefore, staff recommends that should this new MoveMPK mobility model be put into effect, the Spirit Bus program would be sharply modified (i.e. special routes for Mark Keppel or other school for students only) and potentially eliminated over a set period of time.

A separate item on tonight's agenda included a new four (4) year contract with a contractor to continue to operate the Spirit Bus system. The contract includes language regarding modification or termination to the agreement, in the event that the Council directs staff to modify or stop Spirit Bus service at a point in the future.

Challenges Learned from GoMonrovia Mobility Program Implementation

In conversations with key staff from the GoMonrovia program, staff learned of some of their challenges throughout the implementation process. While its mobility program is still evolving, Monrovia staff shared the following insights:

Dedicated Staff That Works in a Team

GoMonrovia has a team of dedicated full-time city staff members to establish and implement the program. While the City Manager's Office spearheaded the program, the program is run by one Assistant to the City Manager, one Senior Management Analyst from the Public Works Department, and a team of Recreation Department staff. It was a strong team effort that helped launch their program in such a short time frame successfully. Staff recommends including some form of staff support in addition to existing staff, if this program is to roll out in Monterey Park.

Effective Community Outreach Plan

Staff made numerous presentations at community meetings, hosted several study sessions to study fee structures, and hired a marketing company to assist in advertising the program so the community, commuters, and visitors are aware of this new mobility program for a successful program implementation. This is a primary reason that staff is recommending that marketing be included in our MoveMPK program.

Subsidized Fee Study

During early implementation phase, Monrovia staff calculated a subsidize cost of \$5.00 per ride to provide users with an affordable fee structure that starts as low as at \$0.50 per ride to/from Old Town and Gold Line Station. There were approximately 500,000 riders recorded in the first year of the program, which was five times more than the anticipated 100,000 subsidized rides per year. As a result, Monrovia needs to revisit their current fee structure. Staff is recommending that we start with \$1.00 shared rides and go from there.

Concierge Service Powered by Lyft

Monrovia's agreement with Lyft includes a Concierge Service term that allows third-party booking not using a smart phone. With the Concierge Service, DAR users can call into the call center to book a ride, receive pre-trip cost estimates, driver's expected time of arrival and vehicle information. This call center service is crucial for those who do not have or use a Smartphone. The Concierge Service also helps identify and shift non-ADA-related calls to Lyft dispatcher thereby reducing the City's subsidized costs per ride and reserving ADA accessible vehicles for riders who have ADA-related needs.

FISCAL IMPACT:

Staff is still in the process of reaching out to ride-share providers Lyft and Uber; quotes from ride-share providers have not been obtained. If we conservatively use the subsidy cost of \$5.00 per trip (based on the current \$4.10 per ride), it can generate approximately \$338,800 savings to the City's DAR program in which current cost is \$49.78 per ride. The DAR program is funded by Prop A funds; the cost savings can be used towards establishing the new mobility program. As for the non-ADA related trips through the mobility program, the operating costs are anticipated the same in FY 19-20 as current cost per passenger is \$4.10. However, there will be capital cost savings from discontinuation of replacement of buses. The operating cost savings will be achieved in future years beginning FY 20-21 if we set the fee structure right as the rate of fixed-route cost per passenger will increase every year - it was a 37% increase in FY 17-18.

If the City Council chooses not to approve the MoveMPK mobility program, the total FY 18-19 adopted budget allocation of \$1,490,159 will continue to fund the Spirit Bus services and DAR program. The DAR program has a budget of \$607,890. Based on the

recent fixed-route transit proposal, the fixed route transit program cost for FY 19-20 is projected at \$1,020,000.

Respectfully submitted by:



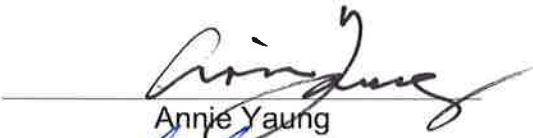
Mark A. McAvoy
Director of Public Works/
City Engineer

Prepared by:



Bonnie Tam
Principal Management Analyst

Approved by:



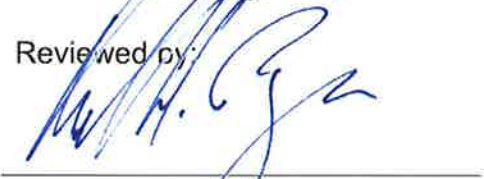
Annie Yaung
Director of Management Services

Approved by:



Ron Bow
City Manager

Reviewed by:



Karl H. Berger
Assistant City Attorney

ATTACHMENTS:

1. SGVCOG Bike Share Program Scope of Work
2. Draft Gotcha Master Services Agreement
3. Metro Bike Share Program Website

ATTACHMENT 1
SGVCOG Bike Share Program Scope of Work

SECTION 11

CAPITAL IMPROVEMENT PROGRAM

11-1 Introduction

The Capital Improvement Program (CIP) consists of projects that will enhance the system to meet the established criteria, properly maintain the system's assets, and replace the facilities that have reached the end of their useful lives. The goal of the CIP is to provide the City with a long-range planning tool that will allow construction of the recommended projects in an orderly manner to improve the existing system and provide for future growth. In order to accomplish this goal, it is necessary to determine the estimated cost of the needed water system improvements identified in this report, establish a basis and prioritize each of the projects.

The recommended CIP is shown in Table 11-1. Project locations are shown on Figure 11-1.

11-2 Cost Estimates

Cost estimates have been prepared for each recommended project, based upon information from recent similar projects. The pipeline replacement costs are based upon \$35 per diameter inch per foot. The City is largely developed and future pipelines will be constructed along alignments with many existing utilities. Therefore, the costs of constructing new or replacement facilities will be generally higher in these areas than those in undeveloped areas. New pump station and well costs include providing permanent back-up power. Construction costs can be expected to fluctuate as changes occur in the economy. These costs should therefore be reevaluated and updated annually based upon Engineering News Record (ENR) Index for the Los Angeles area (ENRLA), with the base ENRLA Index of 10,285 for April 2012.

The improvements recommended herein are conceptual in nature based on existing planning information available. Therefore, they should not be considered as absolute for final design. Further analysis and refinement will be necessary prior to commencing work on the final plans, specifications and estimates package for each project. Detailed design reports (PDR) should be prepared to select the final design projects. At a minimum, the PDR must address: pump station location, system hydraulics, demands and pressures, pump selections, backup power, design criteria, maintaining service to existing areas, construction issues, cost estimates, phasing and scheduling. The pump station firm capacity, number of pumps, and type of pumps must be evaluated and determined during the development of the PDR.

The cost estimates that follow were generated by estimating the quantities of required items for each improvement, and applying typical unit prices to obtain the total estimated construction costs. An amount equal to approximately 35 percent is added to the construction cost estimates to cover contingencies, project design, administration, and construction duration services. The resultant sum is the total estimated project cost. Cost estimates for each recommended project are shown in Table 11-1.

Annual improvement projects are separated out in Table 11-1. The total Capital Improvement Project costs is estimated at 100 Million dollars. Annual improvement costs are estimated at 5 Million dollars.

11-3 Project Priorities

The primary consideration in establishing project priorities for the capital improvement program list must always be given to the health, safety and welfare of the public and the customers. In general, the projects necessary to improve the existing system are scheduled earlier in the order of supply, pumping and storage. Fire protection rates as a high priority, but is usually dependent on the supply and storage, as well as the distribution system.

Supply improvements rate in the order of benefit to the overall system, and reliability during emergencies such as multiple sources.

Pumping improvements rate in the order of ability to augment fire flows, capacity to maintain adequate storage levels in the reservoirs, and redundancy of power and pumps to provide adequate service during emergencies.

Storage improvements rank in the order of fire protection, operational capability to meet average and peak flows, and emergencies.

With these guidelines, the projects recommended in this report and their estimated costs were examined and sorted. Each project is shown with its total estimated project cost. The City should review this schedule and adjust it annually to respond to changed conditions and to take advantage of concurrent construction such as street paving projects or adjacent infrastructure work.

Table 11-1
Capital Improvement Program

CIP No.	Project	Facility Location Description	Additional Project Information	Service Zone	Date of Construction for Existing Facility	Justification	Recommended Facilities				Construction Cost (\$)	Eng. & Admin. Cost (\$)	Total Project Cost (\$)
							Minimum Firm Capacity (gpm)	Res Size (MG)	Pipe Size (in)	Pipe Length (ft)			
1	Expansion of Air Strippers at Well 5 Site or Advanced Oxidation Upgrade for Delta Plant	Well 5 Site or Delta Plant	City currently conducting study to determine best treatment alternative	-	-	Water Quality					\$3,000,000	\$1,050,000	\$4,050,000
	Replace Delta Settling Tanks	2657 N. Delta Ave	2 tanks @ 1MG each; Project cost includes pipe improvements necessary to reach new settling tanks	All	1975	Condition		2.0			\$4,500,000	\$1,575,000	\$6,075,000
	Replace Delta Booster Pump Station	2657 N. Delta Ave	Provide separate standby pumps to pump to Zone 1 and to Zone 2.	All	1975	Age / Condition	8,400				\$4,000,000	\$1,500,000	\$5,500,000
	Install Stand-by Generator(s) for New Delta Booster Pump Station	2657 N. Delta Ave		All	-	Criteria					\$800,000	\$280,000	\$1,080,000
2	Russell Reservoir Construction		Design completed 2011-2012	2	-	Increase Storage		3.0					
	Replace Russell Booster Pump Station.	750 S. Russell Ave	Remove hydropneumatic tank and install VFD operated pumps.	2A(2)		Improve Fire Protection	Combined Firm Capacity of Zone 2A(2) and 2A(3) Pump Stations should be a minimum of 3400 gpm				\$6,000,000	\$1,000,000	\$7,000,000
3	Replace Bradshawe Booster Pump Station	1009 S. Bradshawe Ave	Remove hydropneumatic tank and install VFD operated pumps.	2A(3)		Improve Fire Protection	Combined Firm Capacity of Zone 2A(2) and 2A(3) Pump Stations should be a minimum of 3400 gpm				\$2,000,000	\$800,000	\$2,800,000
	Replace Bradshawe Reservoir 3			2	1949	Age / Condition		1.0			\$2,000,000	\$700,000	\$2,700,000
4	New Booster Pump Station from Zone 2 to 5	To be determined		5	-	Improve Fire Protection / Redundancy	4,000				\$3,000,000	\$1,150,000	\$4,150,000
5	Repair PRS valves from Zone 2 to 2B(2) and add pressure relief	Grandridge Ave and Pavo Real	Place Pavo Real PRS into operation; Replace 12" valve in Grandridge PRS with pressure relief	2B(2)		Improve Fire Protection / Redundancy					\$200,000	\$70,000	\$270,000
6	PRS from Zone 5 to 3	Adjacent Pinetree Reservoir	Redundancy to Vagabond Booster Pump Station; Includes pipeline to connect to Zone 3	3	-	Improve Fire Protection / Redundancy			8	500	\$390,000	\$136,500	\$526,500
7	Country Booster Pump Station Improvements	901 Country Rd	Increase capacity and add stand-by generator	2A(1)	2003	Improve Fire Protection	Combined Firm Capacity of Zone 2A(1) Pump Stations should be a minimum of 3800 gpm				\$2,000,000	\$800,000	\$2,800,000
8	Replace Ackley Booster Pump Station	567 Ackley St	Remove hydropneumatic tank and install VFD operated pumps.	2A(1)	1961	Improve Fire Protection	Combined Firm Capacity of Zone 2A(1) Pump Stations should be a minimum of 3800 gpm				\$2,000,000	\$800,000	\$2,800,000
9	New Booster Pump Station from Zone 2 to 3	To be determined - possibly Sunnyslopes Park	Redundancy to Brightwood Booster Pump Station; Includes pipeline to connect to Zone 2	3	-	Improve Fire Protection / Redundancy	3,900		12	1,000	\$2,420,000	\$847,000	\$3,267,000
10	New Booster Pump Station from Zone 3 to 4	To be determined	Redundancy to Kingsford Booster Pump Station	4	-	Improve Fire Protection / Redundancy	2,400				\$2,000,000	\$800,000	\$2,800,000
11	Replace Pinetree Reservoir 8	2167 Amiba Dr	Replace Pinetree Reservoir if a solution is not found to remedy separation between floor plate and ringwall connection	2	1976	Condition		2.0			\$4,000,000	\$1,400,000	\$5,400,000
12	SCADA upgrades/improvements	-		-	-						\$500,000	\$175,000	\$675,000
13	Water Utility Office Building at Garvey Reservoir Upgrades			-		Condition					\$500,000	\$175,000	\$675,000
14	Replace Well No. 1	2745 N. Delta Ave		-	1924	Age					\$2,500,000	\$875,000	\$3,375,000
15	Replace Well No. 3	2657 N. Delta Ave		-	1946	Age					\$2,500,000	\$875,000	\$3,375,000

Table 11-1 (Continued)
Capital Improvement Program

CIP No.	Project	Facility Location Description	Additional Project Information	Service Zone	Date of Construction for Existing Facility	Justification	Recommended Facilities				Construction Cost (\$)	Eng. & Admin. Cost (\$)	Total Project Cost (\$)
							Minimum Firm Capacity (gpm)	Res Size (MG)	Pipe Size (in)	Pipe Length (ft)			
Fire Protection Pipeline Improvements													
16	Zone 1 Fire Protection Pipeline Improvements	Varies		1		Improve Fire Protection			8	7,492	\$2,097,760	\$734,216	\$2,831,976
17	Zone 1 Fire Protection Pipeline Improvements	Varies		1		Improve Fire Protection			12	6,988	\$2,934,960	\$1,027,236	\$3,962,196
18	Zone 2 Fire Protection Pipeline Improvements	Varies		2		Improve Fire Protection			8	33,030	\$9,248,400	\$3,236,940	\$12,485,340
19	Zone 2 Fire Protection Pipeline Improvements	Varies		2		Improve Fire Protection			12	13,701	\$5,754,420	\$2,014,047	\$7,768,467
20	Zone 2A(1) Fire Protection Pipeline Improvements	Varies		2A(1)		Improve Fire Protection			8	3,198	\$895,440	\$313,404	\$1,208,844
21	Zone 2A(1) Fire Protection Pipeline Improvements	Varies		2A(1)		Improve Fire Protection			12	764	\$320,880	\$112,308	\$433,188
22	Zone 2A(2) Fire Protection Pipeline Improvements	Varies		2A(2)		Improve Fire Protection			6	1,327	\$371,560	\$130,046	\$501,606
23	Zone 2A(3) Fire Protection Pipeline Improvements	Varies	Includes connections from Zone 2A(2) to 2A(3)	2A(3)		Improve Fire Protection			8	6,318	\$1,769,040	\$619,164	\$2,388,204
25	Zone 4 Fire Protection Pipeline Improvements	Varies		4		Improve Fire Protection			8	2,158	\$604,240	\$211,484	\$815,724
26	Zone 4 Fire Protection Pipeline Improvements	Varies		4		Improve Fire Protection			12	2,416	\$1,014,720	\$355,152	\$1,369,872
27	Zone 4A Fire Protection Pipeline Improvements	Varies		4A		Improve Fire Protection			8	7,326	\$2,051,280	\$717,948	\$2,769,228
28	Zone 4B Fire Protection Pipeline Improvements	Varies		4B		Improve Fire Protection			8	4,489	\$1,251,320	\$437,962	\$1,689,282
29	Zone 5 Fire Protection Pipeline Improvements	Varies		5		Improve Fire Protection			8	3,204	\$897,120	\$313,992	\$1,211,112
30	Zone 5 Fire Protection Pipeline Improvements	Varies		5		Improve Fire Protection			12	2,005	\$842,100	\$294,735	\$1,136,835
Total											\$74,363,240	\$25,527,134	\$99,890,374
Annual Improvement Projects													
31	Reservoir and Booster Pump Station Improvements	Varies		All	Varies	Condition					\$500,000	\$175,000	\$675,000
32	Meter Exchange Program	Varies		Varies	-	Age					\$200,000	\$70,000	\$270,000
33	Pipe Replacement Program	Varies		Varies	Varies	Age					\$3,000,000	\$1,050,000	\$4,050,000
Total											\$3,700,000	\$1,295,000	\$4,995,000



Scope of Work

The San Gabriel Valley Council of Governments (SGVCOG) desires to engage a qualified firm to provide services for implementing, operating and maintaining a highly successful and financially self-sustaining regional automated e-bike share system. At a minimum, the system must include 840 bicycles. The bike share system should incorporate technology to allow bicycles to be returned at any existing bike rack or identified bike parking location. All bicycles in this fleet must be enabled with pedal-assist or fully electric technology, and at least 420 bicycles in the fleet must serve communities that are identified as Disadvantaged Communities as defined by [CalEnviroscreen](#) or [SB 535](#). Implementation of the system is expected to take place beginning in Spring of 2019. It is expected that the system will launch in phases, with flexibility for proposers to set a timeline of implementation.

The successful firm shall be responsible for site planning and installation of the system at locations on public properties, private properties (including colleges, universities and major employers), parks, in the public right-of-way and at all other proposed locations. Additionally, the successful firm must show, by using supporting data, how their proposal would reduce vehicles miles traveled (VMT) and encourage long-term mode shift from single occupancy vehicles.

List of Participating Cities:

1. Arcadia
2. Covina
3. Duarte
4. El Monte
5. La Verne
6. Monterey Park
7. Pomona
8. San Dimas
9. South El Monte
10. Pasadena
11. South Pasadena
12. County of Los Angeles (select unincorporated areas within the San Gabriel Valley)

As described in the scope of work below, the SGVCOG, on behalf of the participating cities, will fund certain expenses related to equipment, infrastructure and program launch. The vendor must agree to operate and maintain the system at no cost to the SGVCOG and/or participating cities. The participating cities will work with the SGVCOG to develop a local ordinance to manage the vendor as an authorized bike share provider within their jurisdiction.

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Scope

- Vendor must deliver, at a minimum, 840 bicycles to identified communities in the San Gabriel Valley. Proposal should identify an optimized fleet size and cost per bicycle. The SGVCOG reserves the right to fund and award additional bicycles and include additional cities under this contract, if deemed appropriate. All bicycles must be pedal assist or fully electric. Proposal should indicate how users access bicycles (e.g. via a mobile phone app, at specified “mobility hub” locations, etc.) (**Eligible Expense**).
- Proposal must include a long-term (minimum 36 months) plan for launch, maintenance and operations that addresses the following:
 - **Launch and Pre-Launch (Eligible Expense):** Vendor will be responsible for planning and executing launch events to showcase the system and provide an opportunity for media and community engagement. These events will begin the region wide roll out of the system. Based on coordination with participating cities, the vendor may launch the system in phases. Additionally, vendor will assist with the enrollment of users, coordinate with cities on City-specific launch events, and identify and support additional strategies, such as open streets events, to engage first-time users.
 - **Marketing, Outreach and Education (Ineligible Expense):** Vendor will oversee branding, marketing, membership sales and public relations. Marketing and outreach should, at minimum, focus on the following groups: college and university students, major employers, and transit users. Marketing and outreach materials should incorporate safety information and best practices to minimize accidents, encourage use of helmets and reinforce existing laws. Vendors are encouraged to partner with nonprofit or community-based organizations to outreach to community members to increase participation and support safety messaging. Marketing should also include encouraging potential riders to develop long-term mode-shift behaviors.
 - **Maintenance and Operations:** This includes ongoing reporting, customer service, accounting, complaint resolution and legal issues associated with system.
 - **Bicycle Parking Infrastructure (Eligible Expense):** Vendor will be responsible for installation of additional bike racks, bike corrals, designated parking zones, charging stations, mobility hubs, signage and wayfinding to locate bike infrastructure. For any proposed parking zones and/or mobility hubs, proposal should include details on how designated zones would be selected and marked (i.e. paint, decals, etc), and may include areas prohibited for parking. A mobility hub is defined as a single location (business, university, housing, etc.) where users can rent/return bicycles. Hub locations should

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encourage multimodal connectivity and reduce travel times. Bike parking placement can be informed and improved by mapping hot spots of demand for walking, biking, and bike share and connections to existing bike lanes and trails.

- **Bike Parking and Charging Strategy (Eligibility Varies):** Proposal must include a comprehensive strategy for ensuring that a very high percentage of bicycles will be parked legally and responsibly at any time, minimizing the negative impacts to pedestrians, transit riders, and private property owners. In addition to leveraging additional bicycle parking infrastructure referenced above, the strategy should be multi-faceted and could include existing or new technology, user incentives/disincentives, education, restrictions on parking areas (and in which types of locations). The strategy may include the use of geo-fencing to encourage/enforce legal bike parking. If any proposed technology is not yet available, provide a date by which it would be launched. Vendor Bike Parking Strategy should ensure at least 90% of bicycles not in use are available for rental, and are parked in compliance with the parking strategy at all times. The eligibility of the expenses will vary based on their nature. Any up-front infrastructure costs, such as geo-fencing technology, sensors, etc, are eligible as well as any initial education and marketing included as a part of launch activities. Any ongoing labor, marketing, pricing incentives or other expenses incurred after launch are ineligible for reimbursement. Additionally, the vendor can propose charging infrastructure for pedal assist / electric bikes. This would be an eligible expense.
- **Ongoing Maintenance Plan (Ineligible Expense):** Vendor must identify a plan to ensure ongoing, regular maintenance of all bicycles. Maintenance includes, but is not limited to, repair and lifecycle replacement of entire system and all components to ensure safe and usable bikes. Additionally, vendor must identify a strategy to ensure that a high percentage (>90%) of pedal-assist and/or fully electric bicycles available for rental are charged.
- **Ongoing Operations Plan (Ineligible Expense):** Utilizing fully-informed data-driven recommendations, vendor shall work with participating communities to identify bike share priority service zones. The operations plan will address re-balancing of the bikes, incorporating system equity to ensure stations are accessible to a broad cross section of the community. In particular, the vendor should identify how their proposed plan addresses first-last mile connectivity with transit, while concurrently ensuring that their product will not hinder or otherwise add a barrier to access or capacity

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on local transit. Vendors must also identify and implement unique and innovative approaches in their plan to ensure bicycles do not become a public nuisance.

- **Benefit to Disadvantaged Communities (DAC):** Per the terms of the funding source, at least 420 bicycles must be intended to serve Disadvantaged Communities as defined by CalEnviroscreen or SB 535. The Vendor operations plan and placement strategy must describe how the bikes will serve the DAC's within the participating communities.
- **Farebox Integration:** Provide a timeline and work plan for integrating with existing farebox payment systems with other transit agencies so the same card on their system can be used on these bicycles.
- **Ensuring User Privacy and Data-Sharing to Public Agencies:** Vendor must agree to cooperate with the SGVCOG and participating cities in the collection and analysis of aggregated operations and usage data. Additionally, the vendor must describe what reasonable precautions will be taken to ensure user privacy and encryption of financial data. Requirements related to the sale of data will be negotiated during the contracting phase.
- **Financial Plan:** Proposal must describe how the bike share system will be financially sustained without public funds, including an identification of sponsorships (if applicable) and detailed ridership fee information.

RFP Evaluation Criteria

- **Proposer's Expertise, Experience, and Innovation (25%):**
 - Experience in developing and operating similar bike share systems for cities, or institutional partners, including launch, marketing, and outreach. Proposal should specifically identify experience in operating multijurisdictional systems.
 - Ability to maintain a system in a state of good repair for routine and non-routine needs of bikes and station areas
 - References from municipal or institutional clients; minimum 3 references.
 - Proposal should include ridership data for any existing systems.
 - Qualifications of key personnel and roles.
 - Demonstrated ability to achieve mode share shift.
 - Proposal identifies unique or innovative strategies to address issues identified with existing bike share systems (public nuisance/ infringement in public ROW, low ridership, high maintenance and operations costs).
- **Quality of Equipment & Software (15%):**
 - Demonstrate reliability, quality of installation, and quality of equipment as demonstrated in existing systems in operation.

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- Ability to meet all “required” elements listed in Table 3 - Bicycle Elements.
- Ability to acquire high quality equipment with enough stock to serve all participating cities and mechanisms for the SGVCOG and participating cities to monitor the quality of user experience and enhance the system as needed over time.
- **Maintenance and Operations Plan (30%)**
 - Ability to address elements identified in Scope of Work and meet Performance Metrics identified in Table 2 – Performance Metrics.
- **Cost (30%):** The Cost Proposal shall include costs listed as eligible in Table 1 – Task Funding Expense Eligibility. Proposal must clearly identify cost per bicycle (standard, pedal-assist and fully electric).

Table 1 – Task Funding Expense Eligibility

Task	Funding
Bicycles	Eligible Expense
Additional batteries and spare parts (to be used for repairs during term of contract)	Eligible Expense
Launch and pre-launch activities	Eligible Expense
Marketing, outreach and education	Ineligible Expense
<i>Maintenance and Operations</i>	
Bicycle Parking Infrastructure	Eligible Expense
Bike Parking Strategy	Varies (See above)
Ongoing Maintenance	Ineligible Expense
Ongoing Operations	Ineligible Expense
Benefit to Disadvantaged Communities	N/A
User Privacy and Data-Sharing	N/A
Financial Plan	N/A

Table 2 - Performance Metrics

Performance Indicator	Description	Measurement Tool	Minimum Performance Standard	Reporting Frequency
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App & customer service support portal	App/ reservation system fully operational	Uptime reporting	99.5% uptime.	Any given point in time/Quarterly
Bicycle distribution	Maps identifying trends in peak bike distribution	Maps showing aggregate usage patterns	Fleet will focus on serving the communities outlined in above and additional cities that express interest.	Any given point in time/Monthly
Bicycles in service (In working order)	Bikes available for use	Daily uptime reports	Deploy and maintain a minimum of 840 bicycles in service at all times. Bicycles will be phased into deployment over a 6 week period and can be increased based on usage and demand. Vendor will inspect and perform maintenance on all bicycles at least monthly or every 200 miles, whichever is less, to ensure a minimum of 840 bicycles are available for public use at all times, and a minimum of 90% of all pedal assist and/or fully electric bikes should be at least 50% of full charge when available for rental. Vendor may propose short-term and long-term rental options (i.e. hourly, daily, and weekly rental options)	Any given point in time/Quarterly
Bicycle Maintenance and Repairs	Inspection and repair of bicycles to ensure safe and functional usage.	Maintenance reports	Vendor will inspect and perform maintenance on all bicycles at least monthly or every 200 miles, whichever is less. All bicycles must be inspected to insure proper functioning of payment devices, batteries,	Monthly

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			headlights/taillights, tires, brakes and steering. Bicycles failing to meet operational standards must be pulled from public circulation and replaced until repaired. Batteries must be charged or swapped out for fully charged batteries on a daily basis. Vendor must have at least 2 batteries per bicycles available in inventory at all times.	
Report Responsiveness	Response time to non-working bicycles, improper bicycle parking, graffiti / other damage on bicycles or other complaints communicated to Customer Service	Time relative to report logs	All reports will be resolved within two (2) hours during business hours between 8am to 8pm, Monday through Friday except for State and Federal holidays. For any reports outside of business hours, issues must be resolved within two hours (2) of start of next business hours.	Any given point in time/Quarterly
Data Reporting	Real-time data on usage	Aggregate data reports, data dashboards, and mapping	Vendor shall develop and maintain a data "dashboard" that is available to the City and the SGVCOG 24-hours a day, 7 days a week, with real time data, at a minimum the following will be included: • Total bicycle trips • Avg. number of daily riders • Avg. distance of rides • Pick-up and drop-off heat maps • Trip route heat maps • Location of parked	Any given point in time/Monthly

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			bikes • Avg. duration of trips • Unique riders per week	
Bicycle Parking	Implementation of bicycle strategy to ensure that bicycles are not blocking ADA access or right-of-way. Minimized nuisance parking. This could also mean the implementation of a mobility hub for parking, charging and rental.	Reported complaints and maps of designated parking locations compared to available bikes within the location.	Vendor shall ensure that at least 90% of bicycles are parked in compliance with the agreed upon parking strategy at all times. Parking locations must have charging infrastructure, at the location it is returned to, or vendor must provide a mode for easy self-serve charging.	Any given point in time/Monthly

Non-performance Penalties

Provider must meet the following project delivery milestones and performance standards or be subject to the following penalties:

- **Equipment Delivery:** Equipment shall be in place within 90 days of execution of contract (according to project phasing schedule) unless otherwise specified by SGVCOG in writing. Failure to provide equipment by specified date shall result in a penalty of \$50 per bicycle per day.
- **Bicycles in Service:** 840 bicycles must be operational and available to the public at all times during the three-year contract period. A penalty of \$50 per day per bicycle will be assessed if less than 840 bicycles are not available for use by the public
- **Report Responsiveness:** Bicycles reported as being located in a designated non-parking area shall be relocated within 2 hours on working days during business hours between 8am to 8pm Monday through Friday except for State and Federal holidays. For any reports outside of business hours, issues must be resolved within two hours (2) of start of business hours. Failure to respond shall result in a penalty of \$50 per bicycle per day.
- **Bicycle Maintenance and Repairs:** All bicycles must be inspected, at a minimum, once every 30 days to insure proper functioning of payment devices, batteries, headlights/taillights, tires, brakes and steering. Bicycles failing to meet operational standards must be pulled from public circulation and replaced until repaired. Vendor will provide a full inspection log each month. Failure to meet inspection requirements will result in a penalty of \$50 per bicycle.

Table 3 - Bicycle Elements

Required Elements

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- Lighting and reflector system (include rear and front light and meeting California Vehicle code requirements for bicycles ridden at night)
- Puncture resistant tires
- Reliable and intuitive braking system
- One size to fit majority of adult population with seat-only adjustment
- Theft and tamper resistant
- Cargo capacity for up to twenty pounds
- Equipped with GPS tracking devices or equivalent
- Bike with a chain-guard and multiple gears (3 or more)
- Easy to operate: easy to mount and to hold in stopped position
- Kickstand or other device to allow the bicycle to be supported upright
- Equipped with sensors on bikes to diagnose and self-report mechanical problems
- Front or rear basket

Desired Elements

- Corrosion resistant material with rust-proof external parts
- Chainless bike
- Light weight (less than 35 pounds)
- Comfortable seat with an upright riding position allowing for confident riding in traffic
- Record of reliable operation under similar regional bikeshare system conditions
- Easily adjustable seat that resists movement after adjustment
- Lighting system that remains on when the bicycle is not in motion (i.e., stopped at an intersection)

Pedal Assist and Fully Electric Bicycle Elements

Required Elements

- User interface panel that lets riders know their speed and battery charge level.
- Capped speed of 20MPH (Type I or Type II)
- 40+ mile range on a single charge
- 15-20 mile range for fully electric bicycles

Desired Elements

- Optional on/off drive system
- Solar Charging

ATTACHMENT 2

Draft Gotcha Master Services Agreement



MASTER SERVICES AGREEMENT

THIS MASTER SERVICES AGREEMENT (this "**Agreement**"), dated as of the ____ day of _____, 2019 (the "**Effective Date**"), is made by and between Gotcha Mobility, LLC, a Delaware limited liability company ("**Gotcha**"), and the City of _____ ("**City**"). Both Gotcha and City are sometimes hereinafter referred to individually as a "**Party**" and, collectively, as the "**Parties**".

WHEREAS, Gotcha is in the business of constructing and providing shared mobility products ("**Assets**") and services with related branding for municipalities, colleges, universities, multi-purposed events and third party brands throughout the United States, and has developed a proprietary shared mobility platform with access to related proprietary software, ongoing maintenance services, and expansion assistance (the "**Business**"); and

WHEREAS, City desires to retain Gotcha to establish and maintain a shared mobility platform using Gotcha Assets ("**Services**") on premises owned by or controlled by the City (the "**Premises**"), and Gotcha is willing to perform and maintain the Services on the Premises, under the terms and conditions hereinafter set forth.

NOW, THEREFORE, in consideration of the foregoing premises, and the mutual covenants and agreements hereinafter set forth, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

1. **Services.**

1.1 **Services.** Gotcha agrees to provide, and City agrees to hire Gotcha to provide, the Services as more particularly described herein and any subsequent order form attached hereto as Exhibit A (the "**Order Form**").

1.2 **Use of Premises.** City hereby grants Gotcha and its Affiliates (defined in Section 8) a non-exclusive, worldwide, fully paid-up and royalty-free license to access and use the Premises (the "**Premises Use License**") during the Term (as defined in Section 4.1), for purposes of performing the Services including, without limitation, for the installation of Asset stations ("**Stations**") on the Premises, for operation and maintenance of the Assets, and for installing certain signage ("**Signage**") in connection with the Services and potential advertising of City or sold to third party brands by Gotcha ("**Advertising**"). The Premises Use License shall be irrevocable during the Term and for a period of sixty (60) days after the expiration or termination thereof, pursuant to Section 4.4(b), and as such shall survive any change in ownership related to any part of the Premises. City shall indemnify and hold Gotcha harmless from and against any and all costs and expenses, including reasonable attorneys' fees and costs, incurred in enforcing the Premises Use License. City makes the public right of way and Premises available to Gotcha in an "AS IS" and "WITH ALL FAULTS" condition. City makes no representations or warranties concerning the condition of the public right of way and Premises or their suitability for use by Gotcha or its customers, and assumes no duty to warn either Gotcha or its customers concerning conditions that exist now or may arise in the future on the Premises or the public right of way.

1.3 **Relationship of the Parties.** The relationship between the Parties under this Agreement is that of independent contractors, and nothing in this Agreement will be construed to create an agency, partnership, joint venture, strategic alliance, employment or other relationship similar to any of the foregoing between the Parties. Each Party, as an independent contractor, will have complete charge of and control over the details of the means, methods and manner of performing its obligations under this Agreement, including equipment, supplies and materials used in connection therewith, to the extent that the foregoing are consistent with the performance of such Party's obligations under this Agreement. Unless specifically authorized to do so under this Agreement or otherwise in writing, no Party will have power to act on behalf of another Party or to bind such other Party by any



representation, promise or commitment, and will make no representation to the contrary to any Person. No Party shall have any responsibility for or control over any employees or contractors of another Party, and under no circumstances shall any such employees or contractors of a Party be considered an employee or agent of another Party.

2. Obligations of the Parties.

2.1 Gotcha.

- (a) Equipment. Gotcha agrees to provide the following as of the Launch Date, as specified in the Order Form: (i) To supply and maintain the quantity of Assets on the Premises; (ii) To install and maintain Stations (as defined in Section 2.1(a)(vi)); (iii) To establish and permit a user of the Assets ("User") access to the propriety software and technology that includes a downloadable proprietary mobile application (the "App") available to Users (collectively, the "Technology"), as set forth in the Order Form (Assets, Stations and Technology are referred to collectively as the "Gotcha Equipment"); (iv) To monitor Gotcha Equipment usage by Users and make adjustments to quantities of Assets at particular Stations; (v) To make the App available for download in Apple iOS or Android form for Users of the Assets to download to their mobile devices and register for an account, subject to their acceptance of the end user license agreement and other legal notices related to the App, for use in connection with their use of the Assets including unlocking a Asset from a Station; (vi) To maintain Gotcha Equipment in good working order and provide routine maintenance in accordance with manufacturer specifications, and to keep records of such maintenance; and (vii) To assist COG in assessing developmental goals and plans for expanding the Services during the Term.
- (b) Personnel. Gotcha shall have a primary contact to act as its authorized representative with City in respect of all matters pertaining to this Agreement (the "Gotcha Contract Manager"), and designate those employees, contractors or vendors in number and skill that it determines, in its sole discretion, to be capable of assisting it to perform the Services.
- (c) Advertising Policies. If Gotcha advertises on the Gotcha Equipment, any advertisements must be pre-approved by City before they are installed or otherwise included on any Asset or Station, provide that City agrees to provide such approval or other decision within five (5) days of any written request by Gotcha and, if City does not timely provide its decision, the advertisement shall be deemed approved for use unless and until Gotcha receives written notice otherwise from City. Gotcha agrees to abide by City advertising restrictions related to advertisements, and understands that City shall have a right to review in advance, monitor and/or disallow any and all Advertising that Gotcha proposes to install on the Assets or Stations, in its sole discretion. The City shall not be entitled to any revenue generated from Advertising under this Agreement.
- (d) Permits. During the Term, Gotcha shall obtain and maintain in good standing all required federal, state, county and local licenses and permits necessary to perform the Services. In the event that any governmental restrictions are imposed on Gotcha that would necessitate alteration of the performance of the Services offered by Gotcha under this Agreement, Gotcha shall immediately notify City, indicating the specific regulation that requires such alteration, and the Parties shall cooperate in good faith to modify the Services in a way to comply with such restriction but also maintains the essence of the Parties' bargain, subject to Section 4.6. During



the Term, Gotcha shall be in good standing as a recognized business entity authorized to transact business pursuant to the laws of the state where the Premises is located and the Services are performed.

- (e) Equal Opportunity Requirements. Gotcha acknowledges and agrees that it is bound by the following in contracting with City: "This contractor and subcontractor shall abide by the requirements of 41 CFR §§ 60-1.4(a), (or for construction contractors, 41 CFR § 60-4.3(a)), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, national origin, protected veteran status or disability."
- (f) Conflict of Interest. Gotcha warrants that it is not a conflict of interest for Gotcha to perform the services required by this Agreement. Gotcha may be required to fill out a conflict of interest form if the services provided under this Agreement require Gotcha to make governmental decisions as defined in Title 2, Division 6, Section 18700 of the California Code of Regulations. Gotcha agrees that upon request of City to fill out such form, it will do so and return the form within five (5) business days.
- (g) Reports. Gotcha shall, at such time and in such form as City may require, furnish reports concerning the status of services and tasks required under this Agreement. Each and every report, draft, work product, map, record and other document produced, prepared or caused to be prepared by Gotcha pursuant to or in connection with this Agreement shall be the exclusive property of City.

2.2 City.

- (a) City Contract Manager. City agrees to designate one of its employees or authorized representatives to serve as its primary contact with Gotcha and its Affiliates with respect to this Agreement, and to act as its authorized representative with respect to matters pertaining to this Agreement (the "**City Contract Manager**"), with such designation to remain in force unless and until a successor City Contract Manager is appointed. The City Contract Manager shall respond promptly to any reasonable requests from Gotcha for instructions, information or approvals required by Gotcha to provide the Services.
- (b) Access. City shall ensure that Gotcha has continual access to the Premises, and those amenities reasonably necessary for Gotcha's performance of the Services including, without limitation, for the installation and maintenance of Assets, Racks, Stations, Signage and Advertising in connection with the Services.
- (c) Ownership; No Liens. All Gotcha Equipment used in connection with the Services, unless otherwise expressly set forth in this Agreement, shall remain the property of Gotcha, and shall at no time be deemed a fixture or property belonging to City or any other party. City shall not directly or indirectly cause or create any mortgage, pledge, lien, charge, security interest, claim



or other encumbrance (“**Lien**”) on or with respect to any Gotcha Equipment. In the event that City causes or creates any such Lien, it shall immediately notify Gotcha thereof and undertake commercially reasonable efforts to cause such Lien to be discharged and released from any record, at City’s sole cost and expense. City shall indemnify and hold Gotcha harmless from and against any and all costs and expenses, including reasonable attorneys’ fees and costs, incurred in discharging and releasing any such Lien. All City Equipment used in connection with the Services, unless otherwise expressly set forth in this Agreement, shall remain the property of City.

- (d) Additional Equipment. Gotcha will make available to City, at its option, to purchase certain racks, signage panels, and other related equipment (“**Additional Equipment**”) that could be use on the Premises in conjunction with the Assets. If the City or any of its constituent members wishes to purchase any such Additional Equipment at any time, the Parties shall enter into another Order Form under this Agreement.

3. Fees and Expenses.

- 3.1 User Fees. In consideration of the provision of the Services by Gotcha, City shall permit Gotcha to directly bill and collect from Users various fees to utilize the Services, including but not limited to, monthly and annual membership fees, pay as you go fees and penalty fees (“**User Fees**”). City shall not be entitled to any User Fees collected due to the Services provided under this Agreement.
- 3.2 Taxes. Each Party shall be solely responsible for any and all income taxes, and related interest or penalties, incurred by such Party in respect of this Agreement including, without limitation, any federal, state, or local income tax, and any withholding or employment taxes imposed upon such Party, including in respect of any advertising revenue to such Party.

4. Term and Termination.

4.1 Term, Renewals and Fee Changes.

- (a) Term and Renewals. This Agreement shall commence upon the Effective Date and continue for a period of three (3) years from the Launch Date (the “**Initial Term**”). Upon expiration of the Initial Term, this Agreement may be renewed for an additional three (3)-year period (the “**Renewal Term**”) if the Parties concur in writing no later than one hundred and twenty (120) days prior to such expiration. Upon expiration of the Renewal Term, unless the Parties agree otherwise, this Agreement shall continue on a month-to-month until terminated by either Party upon thirty (30) days’ written notice to the other Party (the “**Extended Term**”); *provided, however*, that the Extended Term shall automatically expire after twelve (12) months. The Initial Term, the Renewal Term and the Extended Term, if any, are referred to collectively as the “**Term**”.

- 4.2 Termination for Cause. Either Party may terminate this Agreement, effective upon written notice to the other Party (the “**Defaulting Party**”), if the Defaulting Party: (i) materially breaches this Agreement, and such breach is incapable of cure, or with respect to a material breach capable of cure, the Defaulting Party does not cure such breach within sixty (60) days after receipt of written notice of such breach; (ii) becomes insolvent or admits its inability to pay its debts generally as they become due; (ii) becomes subject, voluntarily or involuntarily, to any proceeding under any bankruptcy or insolvency law, which is



not fully stayed within ten (10) days or is not dismissed or vacated within sixty (60) days after filing; (iii) is dissolved or liquidated or takes any corporate action for such purpose; (iv) makes a general assignment for the benefit of creditors; or (v) has a receiver, trustee, custodian or similar agent appointed by order of any court of competent jurisdiction to take charge of or sell any material portion of its property or business.

4.3 Termination Without Cause.

- (a) Gotcha. Gotcha may terminate this Agreement at any time prior to the expiration of the Term, for any reason whatsoever, by providing City with thirty (30) days' prior written notice of its decision to terminate.
- (b) City. It is acknowledged by Gotcha that funding for the Services under this Agreement is provided by grant funds received from one or more other government agencies and that City lacks sufficient funds of its own to pay for the Services in the absence of the grant funds. Should the grant funds be suspended, terminated, or otherwise made unavailable by the grantor agency or agencies, City may terminate this Agreement at any time prior to the expiration of the Term, upon thirty (30) days' written notice documenting proof of the unavailability of funds.

4.4 Effect of Termination.

- (a) Equipment Removal. Upon any termination or expiration of this Agreement, for any reason, the License granted hereunder shall automatically terminate after a period of sixty (60) days following such date, and Gotcha shall be permitted reasonable access to the Premises for such post-termination period, or longer if otherwise extended by the Parties, for purposes of removing Gotcha Equipment on the Premises. The Parties will cooperate in good faith in respect of such removal, and coordinate appropriate times and procedures for such access and removal. Upon removal of all Gotcha Equipment, City shall have no obligation to ensure access for Gotcha or its personnel to the Premises for purposes of the Business.
- (b) Survival. The rights and obligations of the Parties set forth in this Section and in Sections 5, 8, 9 and 10, and any right or obligation of the Parties in this Agreement which, by its nature, should survive termination or expiration of this Agreement, will survive any such termination or expiration of this Agreement.

- 4.5 Force Majeure. Neither Party will be liable or responsible to the other Party, or be deemed to have defaulted under or breached this Agreement, for any failure or delay in fulfilling or performing any term of this Agreement, when and to the extent such failure or delay is caused by any: (i) acts of God; (ii) flood, fire, or explosion; (iii) war, terrorism, invasion, riot, or other civil unrest; (iv) embargoes or blockades in effect on or after the date of this Agreement; (v) national or regional emergency; (vi) strikes, lock-outs, labor stoppages, disputes or slowdowns, failures of subcontractors or suppliers, or other industrial disturbances; (vii) passage of law or governmental order, rule, regulation, or direction, or any action taken by a governmental or public authority, including but not limited to imposing an embargo, export or import restriction, quota, or other restriction or prohibition; or (viii) national or regional shortage of adequate power, telecommunications, or transportation facilities (each of the foregoing, a "Force Majeure"); in each case, provided that such event is outside the reasonable control of the affected Party.



5. Intellectual Property.

5.1 Rights. All intellectual property rights of Gotcha related to the Business and the Services, including Gotcha Equipment, and all materials prepared by Gotcha or its Affiliates in connection therewith and hereunder including, without limitation, (i) copyrights, software, patents, patent applications and patent disclosures and inventions (whether patentable or not), (ii) trademarks, service marks, trade secrets, trade dress, trade names, logos, taglines, corporate names and domain names, insignia, symbols or decorative signs (collectively, "**Marks**"), (iii) know-how, show-how and Confidential Information related to any of the foregoing, and (iv) together with all of the moral rights in and goodwill associated therewith, derivative works, corrections, enhancements, updates, modifications, tangible or intangible proprietary information, rights to apply for registration, and all other rights therein and thereto (collectively, "**Intellectual Property Rights**"), except for any Confidential Information of City (to the extent not prepared by Gotcha), are and shall be owned by Gotcha (or, in certain instances, by its Affiliates), and not by City. Gotcha hereby grants City a limited license to use all such Intellectual Property Rights solely in connection with the Services during the Term, free of additional charge and on a non-exclusive, worldwide, non-transferable, non-sublicensable, fully paid-up and royalty-free basis, to the extent necessary to enable City to make reasonable use of the Services. City acknowledges and agrees that other than as expressly provided in this Section, nothing herein shall be construed as Gotcha of, directly or indirectly, selling, leasing, licensing, pledging, sublicensing, lending, encumbering or otherwise transferring any of the foregoing Intellectual Property Rights other than in connection with the Services, and agrees, to the extent permitted under applicable law, to indemnify and hold Gotcha harmless from and against any claim otherwise.

5.2 Marks. No Party grants to the other Party any right in or license to use such Party's Marks, other than as expressly set forth in this Agreement. Each Party grants the other Party (including as to their Affiliates) a limited license to use the other Party's Marks during the Term, free of additional charge and on a non-exclusive, worldwide, non-transferable, non-sublicensable, fully paid-up and royalty-free basis, to the extent necessary for the performance of obligations under this Agreement, which right shall include a right to advertise or make other public announcements in general about the existence of the relationship between City and Gotcha and the Services.

6. General Representations and Warranties. City represents and warrants to Gotcha that: (a) it is a duly authorized to do business by the State of California; (b) it has the lawful power to engage in the business it presently conducts and contemplates conducting, and is not party to any investigation, proceeding or action by any governmental authority which may materially affect its ability to effectuate its obligations under this Agreement and, in the event that it becomes such a party, shall immediately notify Gotcha of such investigation, proceeding or action; (c) it has the authority to execute and carry out this Agreement and to perform its obligations hereunder, and has obtained all necessary authorizations in connection therewith; (d) it has obtained and shall obtain from time to time any and all licenses, permits or other approvals required under applicable law, which license, permits or other approvals shall be kept current at all times throughout the Term; (e) the execution, delivery and performance of under this Agreement shall not conflict with, result in the breach of, constitute a default under or accelerate performance required by its constituent documents or internal regulations, any applicable law or any material covenant, agreement, understanding, decree, judgment, indenture, instrument or order to which it is a party or by which it or any of its properties or assets is bound or affected; and (f) it will comply with all applicable law related to this Agreement and will cooperate fully with Gotcha in complying with such applicable law.



7. Insurance. On or before the commencement of the terms of this Agreement, Gotcha shall furnish the City with certificates showing the type, amount, class of operations covered, effective dates and dates of expiration of insurance coverage in compliance with this Section 7. Such certificates, which do not limit Gotcha's indemnification responsibilities, shall also contain substantially the following statement:

"Should any of the above insurance covered by this certificate be canceled or coverage reduced before the expiration date thereof, the insurer affording coverage shall provide ten (10) days' advance written notice to the City. Attention: Risk Manager."

It is agreed that Provider shall maintain in force at all times during the performance of this Agreement all appropriate coverage of insurance required by this Agreement with an insurance company that is acceptable to the City and licensed to do insurance business in the State of California. Endorsements naming the City, its City Council, boards, committee, commissions, officials, employees, and volunteers as additional insured shall be submitted with the insurance certificates.

- 8.1. Coverage: Provider shall maintain the following insurance coverage:

(a) Workers' Compensation:

Statutory coverage as required by the State of California.

(b) Liability:

Commercial general liability and Right of Way damage coverage in the following minimum limits:

Bodily Injury: \$1,000,000 each occurrence
 \$2,000,000 aggregate - all other

Property Damage: \$1,000,000 each occurrence
 \$2,000,000 aggregate

If submitted, combined single limit policy with aggregate limits in the amounts of \$2,000,000 will be considered equivalent to the required minimum limits shown above.

(c) Automotive:

Comprehensive automobile liability coverage (any auto) in the following minimum limits:

Bodily injury: \$1,000,000 each occurrence
Property Damage: \$1,000,000 each occurrence

or

Combined Single Limit: \$2,000,000 each occurrence

(d) Excess Liability (Umbrella):

\$5,000,000 for bodily injury, personal injury, and property damage liability coverage



- 8.2. Subrogation Waiver: Gotcha agrees that in the event of loss due to any of the perils for which it has agreed to provide comprehensive general and automotive liability insurance, Gotcha shall look solely to its insurance for recovery. Gotcha hereby grants to City, on behalf of any insurer providing comprehensive general and automotive liability insurance to either Gotcha or City with respect to the services of Gotcha herein, a waiver of any right to subrogation which any such insurer of said Gotcha may acquire against City by virtue of the payment of any loss under such insurance.
- 8.3. Failure to Secure : If Gotcha at any time during the term hereof should fail to secure or maintain the foregoing insurance, City shall be permitted to obtain such insurance in Gotcha's name or as an agent of Gotcha and shall be compensated by Gotcha for the costs of the insurance premiums at the maximum rate permitted by law and computed from the date written notice is received that the premiums have not been paid.
- 8.4. Additional insured City, City Council, and the City's boards, committee, commissions, officials, employees, and volunteers shall be named as an additional insured under all insurance coverages, except worker's compensation and professional liability insurance. The naming of an additional insured shall not affect any recovery to which such additional insured would be entitled under this policy if not named as such additional insured. An additional insured named herein shall not be held liable for any premium, deductible portion of any loss, or expense of any nature on this policy or any extension thereof. Any other insurance held by an additional insured shall not be required to contribute anything toward any loss or expense covered by the insurance provided by this policy.
- 8.5. Sufficiency of Insurance: The insurance limits required by the City are not represented as being sufficient to protect Gotcha. Gotcha is advised to consult Gotcha 's insurance broker to determine adequate coverage for Gotcha.
8. Indemnification. Each Party agrees to indemnify, defend and hold harmless the other Party and their parent and subsidiary entities, related and affiliate entities, and its and their owners, directors, officers, employees, vendors, representatives and agents ("**Affiliates**") (each, an "**Indemnified Party**") from and against any and all losses, damages, liabilities, obligations, penalties, judgments, awards, costs, expenses, interest, and disbursements (including reasonable attorneys' fees and costs, and expenses related to investigation and appeals, arbitration, enforcement of judgments, and proceedings in equity) ("**Loss**"), which may be suffered by, incurred by, accrued against, charged to or recoverable from any Indemnified Party, by reason of any claims, actions, suits or proceedings ("**Claim**") arising out of or relating to any act, error or omission resulting in grossly negligent, reckless or willful misconduct of such Party or its Affiliates during the Term in connection with this Agreement including, without limitation, Claims arising out of or relating to: (a) bodily injury (including death) to a natural person; (b) damage to any other party's personal or real property; (c) any material misrepresentation or breach of warranty by such Party of any representation or warranty set forth in this Agreement; (d) any material breach by such Party of any provision of this Agreement; and (e) any claim of infringement related to any Intellectual Property Rights; *provided, however*, that the foregoing indemnity shall not apply to the extent that the applicable Loss resulted in whole from the acts or omissions of an Indemnified Party. A Party seeking indemnification under this Agreement shall give written notice thereof to the other Party promptly following discovery of the fact or circumstance giving rise thereto; provided, however, that any delay in providing such notice shall not impact a Party's right to be indemnified, except to the extent that the other Party is actually prejudiced thereby. Neither Party shall settle or compromise any Claim without the prior written consent of the other Party, which consent shall not be unreasonably withheld.



9. Limitation of Liability; Assumption of Risk; Disclaimer. NOTWITHSTANDING ANY OTHER PROVISION OF THIS AGREEMENT, AND TO THE FULLEST EXTENT PERMITTED UNDER APPLICABLE LAW, NO PARTY SHALL BE LIABLE TO THE OTHER PARTY FOR ANY INDIRECT, SPECIAL, CONSEQUENTIAL, MORAL, EXEMPLARY OR PUNITIVE DAMAGES WHATSOEVER, OR FOR ANY LOSS OF USE, LOSS OF PRODUCTION, LOSS OF REVENUE OR PROFITS, COST OF CAPITAL, LOSS OF GOODWILL, LOSS OF OPPORTUNITY, ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT, WHETHER BASED IN CONTRACT, TORT (INCLUDING NEGLIGENCE AND STRICT LIABILITY) OR ANY OTHER THEORY AT LAW OR IN EQUITY, REGARDLESS OF WHETHER SUCH DAMAGE WAS FORESEEABLE AND NOTWITHSTANDING THE FAILURE OF ANY AGREED OR OTHER REMEDY OF IT ESSENTIAL PURPOSES, AND EACH PARTY EXPRESSLY RELEASES THE OTHER PARTIES FROM ANY SUCH LIABILITY. THE PARTIES FURTHER AGREE THAT THE LIABILITY OF A PARTY UNDER THIS AGREEMENT, WHETHER BASED ON A CLAIM IN CONTRACT, EQUITY, NEGLIGENCE, TORT (INCLUDING NEGLIGENCE AND STRICT LIABILITY), OR OTHERWISE FOR ALL EVENTS, ACTS OR OMISSIONS UNDER THIS AGREEMENT, SHALL NOT EXCEED THE TOTAL FEES PAID UNDER THIS AGREEMENT FOR ANY TWO (2)-YEAR PERIOD DURING THE TERM THAT IMMEDIATELY PRECEDED THE DATE OF SUCH CLAIM. THE LIMITATIONS ON LIABILITY IN THIS SECTION SHALL NOT APPLY, HOWEVER, TO: (A) A PARTY'S CRIMINAL OR FRAUDULENT CONDUCT; (B) A PARTY'S OBLIGATIONS OF INDEMNIFICATION RELATED TO INTELLECTUAL PROPERTY RIGHTS UNDER SECTION 6.1 or SECTION 9; (C) TO LIMIT IN ANY WAY THE EXTENT OF APPLICABLE INSURANCE PROCEEDS; (D) TO COG'S OBLIGATIONS OF INDEMNIFICATION UNDER SECTION 1.2 AND SECTION 2.2(G); (E) OR AS OTHERWISE PROHIBITED BY APPLICABLE LAW GOVERNING THE RIGHTS AND DUTIES OF COG IN ENTERING INTO CONTRACTS LIKE THIS AGREEMENT.

Each Party assumes any and all risks of personal injury and property damage attributable to the acts or omissions of such Party or any of its Affiliates, to the degree that such damage is attributable to such Party or Affiliate. GOTCHA MAKES NO WARRANTY WHATSOEVER WITH RESPECT TO THE SERVICES (INCLUDING, FOR CLARIFICATION, THE DELIVERABLES AND THE SERVICES), INCLUDING ANY (A) WARRANTY OF MERCHANTABILITY, (B) WARRANTY OF FITNESS FOR A PARTICULAR PURPOSE, OR (C) WARRANTY AGAINST INFRINGEMENT OF INTELLECTUAL PROPERTY RIGHTS OF A THIRD PARTY; WHETHER EXPRESS OR IMPLIED BY LAW, COURSE OF DEALING, COURSE OF PERFORMANCE, USAGE OF TRADE OR OTHERWISE.

10. Miscellaneous.

- 10.1 Notice. Any notice or approval required or permitted under this Agreement must be in writing and shall be given to the other Parties at their addresses set forth in this Section. Each such notice, request or other communication shall be effective (i) if given via facsimile, the date on which it is transmitted to the number provided by a Party in writing to the other Party, and the appropriate confirmation is received, (ii) if given by U.S. Mail, five (5) calendar days after such communication is deposited in the mail with first class, return receipt requested postage prepaid, addressed as aforesaid, and (iii) if given by overnight courier, forty-eight (48) hours after the date on which such communication is received by such courier. E-mail shall be a permitted means of providing notice to a Party under this Agreement as long as receipt can be verified, and provided that notice through e-mail shall be effective forty-eight (48) hours after the date on which the e-mail notice can be verified as received. Unless otherwise notified by a Party in writing, a Party shall submit any notice hereunder as follows:



<i>If to Gotcha:</i>	Gotcha, LLC, 7 Radcliff St., Suite 200 Charleston, SC 29403 Attn: Brett Vigrass, General Counsel brett@thegotchagroup.com <i>With a copy to:</i> Ryan Leach, CFO ryan@thegotchagroup.com
<i>If to City:</i>	[NAME], [ADDRESS] Attn: [NAME] ([EMAIL])

Any such notices, demands and requests shall be deemed to be delivered (a) if delivered in person, on the date so delivered, and (b) if sent by overnight delivery service, on the delivery date as evidenced by the courier's confirmation. The addresses set forth herein may be changed by written notice to the other Party.

Except as otherwise specifically set forth in this Agreement, all notices, extensions, modifications, consents, requests and approvals to be given by either Party under any section of this Agreement shall be in writing and not be unreasonably withheld by the other Party.

- 10.2 Governing Law. This Agreement shall be governed by, and construed and interpreted in accordance with, the laws of the State of California, without regard to applicable conflicts of law principles, and this Agreement shall for all purposes be deemed to have been executed, delivered and agreed to by and between the Parties entirely within the State of California.
- 10.3 Dispute Resolution; Jury Waiver. Any dispute arising out of or related hereto, which cannot be resolved amicably among the Parties after good faith efforts of not less than sixty (60) days, shall be held in the Superior Court of the County of Los Angeles, California and waive all objections to the laying of venue therein. Each Party shall be responsible for its own attorney's fees and costs in respect of any dispute related to this Agreement, including the costs of any investigations and appeals. EACH PARTY HEREBY KNOWINGLY, VOLUNTARILY AND INTENTIONALLY WAIVES TO THE FULLEST EXTENT PERMISSIBLE UNDER APPLICABLE LAW ANY RIGHT IT MAY HAVE TO A TRIAL BY JURY IN ANY DISPUTE, AND AGREES THAT SUCH WAIVER IS A MATERIAL INDUCEMENT FOR EACH PARTY TO ENTER INTO THIS AGREEMENT AND TO PERFORM THEREUNDER.
- 10.4 Assignment. Except as expressly set forth otherwise in this Agreement, no Party may assign its rights under this Agreement, in whole or in part, without the prior written consent of the other Party. Nothing herein shall be construed to prevent Gotcha from delegating its duties hereunder to its Affiliates, provided that Gotcha in any event shall remain responsible for its obligations hereunder irrespective of any such delegation.
- 10.5 Binding Effect; Survival. This Agreement shall be binding upon, and will inure to the benefit of, the Parties and their successors and valid assigns. The obligations of the Parties and the provisions of this Agreement that by their nature survive the termination hereof, including those obligations as expressly



stated in this Agreement, shall survive and inure to the benefit of the Parties, their successors and valid assigns.

- 10.6 No Third Party Beneficiaries. Except as expressly set forth otherwise in this Agreement, this Agreement is intended solely for the benefit of the Parties and their respective successors and valid assigns, and is not intended to confer any benefits upon, or create any rights in favor of, any other party other than the Parties.
- 10.7 Cumulative Remedies. All rights and remedies of a Party set forth in this Agreement shall be in addition to all other rights and remedies available at law or in equity including, without limitation, a right to specific performance, and temporary and permanent injunctive relief, to the extent permitted under applicable law.
- 10.8 No Waiver. No waiver of any provision of this Agreement shall be effective unless the same shall be in writing and signed by the Party making such waiver, and any such waiver shall apply only to the specific occasion which is the subject of such waiver or consent and shall not apply to the occurrence of the same or any similar event on any future occasion. No delay express waiver of any provision of this Agreement shall be deemed to be or shall constitute a waiver of any other provision whether or not similar, and no waiver shall constitute a continuing waiver. Any delay in enforcement of any provision hereof shall not constitute a waiver thereof.
- 10.9 Entire Agreement; Construction. This Agreement, including its preamble, recitals, Order Form, and any and all exhibits, appendices and valid amendments, constitutes the entire agreement and understanding of the Parties and supersedes all prior or contemporaneous agreements, understandings or representations, written or oral, by the Parties. The headings in this Agreement are provided for convenience of reference only and shall not affect the construction of any text. Any reference to the singular shall also include a reference to the plural, and vice versa, as the context requires. This Agreement shall be construed as drafted by all of the Parties, and no provision of this Agreement shall be interpreted for or against any Party on the basis that a Party, its Affiliates or counsel drafted such provision. In the event of any conflict between any term or provision of this Agreement and any term or provision of any exhibit hereto, the term or provision of this main document shall prevail.
- 10.10 Amendment. This Agreement may not be modified or amended unless done so in a writing signed by the Parties.
- 10.11 Severability. If any term or provision of this Agreement is held by a court of competent jurisdiction to be void, voidable, illegal, invalid or otherwise unenforceable under Applicable Law, such provision shall be severed from this Agreement, and the remaining provisions of this Agreement shall remain in full force and effect.
- 10.12 Counterparts. This Agreement may be executed in one or more counterparts, each of which, including counterparts executed electronically through verifiable means, shall be deemed to be an original for all purposes.
- 10.13 Independent Counsel; Costs. The Parties acknowledge and agree that the terms and conditions of this Agreement have been freely and fairly negotiated. Each Party acknowledges that in executing this Agreement it has relied solely on its own judgment, belief and knowledge, and such advice as it may have received from its own counsel, and that it has not been influenced by any representation or



statement made by the other Party or such Party's Affiliates, including its counsel. Each Party shall pay its own fees and expenses incurred in connection with the negotiation, drafting and execution of this Agreement, and in respect of the transactions contemplated by this Agreement (including, without limitation, attorney's fees and costs).

- 10.14 Further Assurances. From time to time, as and when reasonably requested by a Party or its successors or assigns, the other Parties shall execute and deliver, or cause to be executed and delivered, such documents and instruments, and shall take, or cause to be taken, such further or other actions as may be reasonably necessary, to carry out the purposes set forth in this Agreement.

[Remainder of Page Intentional Blank; Signatures Appear on Following Page]

IN WITNESS WHEREOF, the Parties have executed this Agreement as of the Effective Date.

GOTCHA

City

By: _____

By: _____

Name:

Name: [NAME]

Title:

Title: [TITLE]

Date:

Date: [DATE]

ATTACHMENT 3
Metro Bike Share Program Website

Smart Metro Bikes have arrived on the Westside. [Click here to find out more! \(/smart/\)](#)



<https://bikeshare.metro.net>

MENU

More bikes in more places.

Metro Bike Share is expanding to Central LA and in the Westside.

[Find a Station \(/stations/\)](/stations/)

[Sign Up \(https://metro.net/bikeshare/tap\)](https://metro.net/bikeshare/tap)

How It Works



Release it.



Ride it.



Return it.

[Learn more \(/how-it-works/\)](/how-it-works/)

Choose Your Pass

Get started with a Metro Bike Share pass. Purchase a Pay-Per-Ride pass at any Metro Bike Share kiosk or select one of the pass options below that are available online.

Pay-Per-Ride

\$1.75/30 minutes

All rides are \$1.75 every 30 minutes

Purchase with credit card at any station or online.

24-Hour Access

\$5/day

All rides 30 minutes or less are free

\$1.75 per 30 minutes thereafter

30-Day Pass

\$17/month

All rides 30 minutes or less are free

\$1.75 per 30 minutes thereafter

365-Day Pass

\$150/year

All rides 30 minutes or less are free

\$1.75 per 30 minutes thereafter

RESOLUTION NO.

A RESOLUTION OF THE CITY COUNCIL OF THE
CITY OF MONTEREY PARK, CALIFORNIA
DECLARING THE MONTH OF MAY AS ASIAN
AMERICAN AND PACIFIC ISLANDER HERITAGE
MONTH

The City Council of the City of Monterey Park does resolve as follows:

SECTION 1. The City Council finds and declares that:

- A. Each May, we recount the ways Asian Americans and Pacific Islanders helped shaped our country. During Asian American and Pacific Islander Heritage Month, we celebrate the remarkable accomplishments of Americans of Asian and Pacific Islander Heritage that have enriched our country and helped define our history.
- B. We remember a time over 175 years ago, when Japanese immigrants first set foot on American shores and opened a path for millions more. We remember 1869, when Chinese workers laid the final ties of the transcontinental railroad after years of backbreaking labor and we remember Asian Americans and Pacific Islanders who have made our country bigger and brighter, from Native Hawaiians to the generations of striving immigrants who have shaped our history.
- C. In times of war and in times of peace, Asian and Pacific Americans have faithfully defended the principles of freedom and representative government. They have worked for the advancement of human rights and democratic ideals around the world, and they have promoted greater appreciation for our system of self-government here at home.
- D. Asian and Pacific Americans strengthen our economy as entrepreneurs, business owners, and employees who initiate and expand opportunities for their families, communities, and country. Their languages, art, cuisine, and other cultural elements have enriched the American experience, and many have fearlessly answered the call of duty to defend our freedom as members of our Armed Forces.
- E. This month, we honor the more than 20 million Asian Americans and Pacific Islanders who call America home. We recognize the achievements of Americans of Asian American and Pacific Islander heritage in education, business, science, the arts, government, and the Armed Forces, which have strengthened our Nation. We celebrate their story as a unique part of the American story.
- F. The City Council of Monterey Park declares the month of May to be Asian American and Pacific Islander heritage month in Monterey Park. We encourage all residents to learn more about those of Asian American, Native Hawaiian, and Pacific Islander heritage and to observe this month with appropriate programs and activities.

SECTION 2. The Mayor, or presiding officer, is hereby authorized to affix his signature to this Resolution signifying its adoption by the City Council of the City of Monterey Park, and the City Clerk, or his duly appointed deputy, is directed to attest thereto.

SECTION 3. This Resolution takes effect immediately upon its adoption.

**PASSED, APPROVED, AND ADOPTED BY THE CITY COUNCIL OF THE CITY OF
MONTEREY PARK ON THIS 15TH DAY OF MAY 2019.**

Peter Chan, Mayor
Monterey Park, California

ATTEST:

Vincent D. Chang, City Clerk
Monterey Park, California