



CITY *of* CALABASAS

## **Request for Proposal (RFP)**

for

### **The Operation and Maintenance of Public Transit and Transportation Services for the City of Calabasas**

Issued on:

April 8, 2024

SUBMITTAL DEADLINE:

Monday, April 29, 2024 at 2:00 p.m.



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Curtis Castle, P.E.  
Public Works Director

CITY OF CALABASAS  
Public Works Department  
100 Civic Center Way  
Calabasas, CA 91302

## Request for Proposal for Public Transportation Services

### INTRODUCTION

The City of Calabasas is soliciting proposals from interested, qualified companies to provide services for a variety of transportation programs. The Request for Proposals (RFP) is to provide the City with a set of transit operation services while maintaining a cost-effective approach. The City intends to award one contract to provide the requested services for a three-year term, with up to two one-year extensions.

### REQUEST FOR PROPOSAL (RFP)

The City of Calabasas (“City”) is soliciting Proposals from qualified transit service providers (“Contractor”) for **Public Transportation Services**. Proposals must be submitted at or before **2:00 p.m. on April 29, 2024**. Proposals and amendments to Proposal received after the date and time specified above will not be considered.

Proposals submitted to City must comply with Section I and Section II, and must be based on the Scope of Services provided in Attachment A. Proposals will be evaluated and awarded in accordance with Section IV: Evaluation and Selection. The selected company or companies must be willing to sign an agreement with the terms and conditions shown in the City model Professional Service Agreement (PSA), attached herein as Attachment B. Contractors are encouraged to promptly notify City of any apparent major inconsistencies, problems, or ambiguities in the Scope of Services.

### REQUEST FOR INFORMATION (RFI)

In an effort to maintain fairness in the process, all inquiries concerning this procurement are to be directed only to the City Public Works Department at the following address: 100 Civic Center Way, Calabasas, CA 91302, Attention: Tra'a Bezdecny. Contractors are specifically directed NOT to contact any City Council members or personnel, other than specified in this RFP, for meetings, conferences, or technical discussions that are related to the RFP.

All inquiries must be submitted in writing via email at [tbezdecny@cityofcalabasas.com](mailto:tbezdecny@cityofcalabasas.com) and must be received at the City by the end of business on **April 22, 2024 at 5:00 p.m.** Please note that City will not be responsible for mailing any addendums. All addendums and notifications will be made available on the City’s webpage: <http://www.cityofcalabasas.com/public-notices.html>. Contractors are encouraged to check the website regularly since each Contractor will bear sole responsibility for having the RFP and all addendums.

### CONFIDENTIAL MATTERS

All data and information gathered by the Contractor and its agents, including this RFP and all supplement information, shall be treated by the Contractor and its agents as confidential. The Contractor and its agents shall not disclose or communicate the aforesaid matters to a third part or use them in advertising, propaganda, and/or in another job or jobs, unless written consent is obtained from City.

## MODIFICATIONS/WITHDRAWAL OF PROPOSALS

Modifications will be accepted by City, and binding upon the responding company, where the modification:

- Is received by City at the place designated for submission of RFP responses prior to the deadline; and
- Is clearly labeled “Modification” with the name of the responding Contractor; and
- Is signed by the same individual who signed the original submittal.

At any time prior to scheduled closing time for receipt of RFP submittals, any responding Contractor may withdraw their submittal, either personally or by written request. However, a proposal may not be withdrawn after opening without the written consent of City.

Proposals may be modified or withdrawn prior to the established opening date by delivering written notice to the Public Works Department.

All Contractors are required to certify that they are not debarred, suspended, or otherwise excluded from participating in this project. All Contractors will be required to certify that they are not on the Comptroller General’s list of ineligible Contractors.

## SELECTION PROCESS

A “Shortlist” of Contractors will be developed by City and “Shortlisted” Contractors will be notified by City Staff of their status on **May 2, 2024**. Interviews of the “Shortlisted” Contractors will be required for City’s final selection. The interviews will be held the week of **May 6 to May 10, 2024**. Failure to appear at the interview will cause the Contractor to be eliminated from further evaluation.

## Calendar of Events\*

Distribution of RFP	April 8, 2024
Final Date to Submit RFI	April 22, 2024
Proposal Due Date	April 29, 2024
Development of Shortlist	May 2, 2024
Interviews of Selected Contractors	May 6 – May 10, 2024
Contractor Selection	May 13, 2024
Contract Documents Submitted to City	May 23, 2024
Council Approval of Professional Services Agreement	June 12, 2024
Transition Period	June 17 – June 30, 2024
New Contract in Effect	July 1, 2024

\*Subject to change

## SECTION I: PROPOSAL PACKAGE

### A. Background Information

The City of Calabasas (“City”), is soliciting proposals from interested, qualified companies (“Contractor”) to provide services for a variety of transportation programs. Calabasas is a low density city of 24,000 residents, with hilly terrain, plenty of open space and transitions to rural, suburban design.

The Request for Proposals (RFP) is to provide the City with a defined level of services, while maintaining the most cost-effective approach possible. The City intends to award one contract to provide the requested services for a three-year term, with up to two one-year extensions.

Visit the following link for current Calabasas Shuttle and Trolley Services information:  
<https://www.cityofcalabasas.com/government/public-works/transportation-transit/public-transit-services>.

### B. General Scope of Services

The operation of the Calabasas Transit Program currently consists of the following:

- Seven (7) fixed-route lines. Refer to *Attachment A: Scope of Services* for details. Note that Attachment A will be included in the PSA awarded to the successful proposer.
  - One (1) Citywide fixed transit route within Calabasas City Limits
  - Four (4) peak-service routes during a.m. and p.m. peak transit demand (tripper service)
  - One (1) summer fixed-route Weekend Trolley (Memorial Day to Labor Day)
  - One (1) summer fixed-route Beach Bus (10-week operation)

During the summer, transportation services change due to a shift in demand. A revised route and schedule will be provided by City one month before route changes go into effect for drivers to accommodate changes and learn the route. There are periodic and random special events that occur throughout the year which require transportation; the awarded company will be required to provide those transportation services.

The City of Calabasas shall be responsible for all costs associated with major repairs including but not limited to the following: engine, transmission, and major drive train components, based on approval of City. All repairs and parts shall pertain to the manufacturer’s warranty and shall be serviced per manufacturer’s service intervals. The Contractor shall cover the cost and replacement of all wearable items. The City shall be responsible for all costs associated with vehicle fuel.

### C. Information Provided by City

Contractors are solely responsible for conducting their own independent research, due diligence or other work necessary for the preparation of proposals, negotiation of agreements, and the subsequent delivery of services pursuant to any agreement. In no event may Contractors rely on any oral statements.

Should a Contractor find discrepancies in, or omissions from, this RFP and related documents, or should Contractor be in doubt as to meaning, Contractor shall immediately notify the City's designated representative and, if the point in question is not clearly set forth, a written addendum or bulletin of instructions will be made available on the City's website: <http://www.cityofcalabasas.com>. Each person requesting an interpretation will be responsible for the delivery of such requests to the City's designated representative in writing as outlined in this RFP. The City will not be bound by, or responsible for, any explanation or interpretation of the proposed documents other than those given in writing.

The City will not compensate Contractors for the cost of preparing a response to this RFP.

**D. Intent**

It is the intent of the City to award the contract to the most qualified, responsible Contractor as detailed in the Scope of Services, and with consideration of the potential costs for services. The City will negotiate with the Contractor deemed most qualified by the City to address the specific services to be provided, the time and order of services, staffing, areas of responsibility and proposed fee structure, including the amount and method of payment.

## SECTION II: PROPOSAL CONTENT

The Contractor shall prepare a Statement of Qualifications and a detailed fee schedule for the work to be performed. These proposals shall contain the following information:

**1. Statement of Qualifications:**

a. Company Information

- i. Company Name
- ii. Doing Business As Name
- iii. Address
- iv. Company Website URL
- v. Diversity Certifications (if applicable)

b. Company Contact Person

- i. Contact Name
- ii. Contact Telephone Number
- iii. Contact Email
- iv. If different from above, provide all contact information for person authorized to execute agreements.

c. Staffing Plan and Organization Chart

Provide a staffing plan and organization chart that identifies the key members of the management team that will oversee the Calabasas Transit Service, their responsibilities, and reporting relationships.

- i. At minimum, this will include the general manager, assistant general manager (if proposed), administrative manager, operations manager, maintenance manager, and technology manager.
- ii. The responsibilities of each person should be outlined.
- iii. The staffing plan should document the support and reporting relationships within the company's broader hierarchy.
- iv. If any functions will be subcontracted, these should be identified, along with full documentation of the subcontractor.
- v. Resumes for each of the identified staff members should be provided as an attachment to the proposal.
- vi. The plan should show who will be the main point of contact(s) for City and who will be support staff.

d. Firm Background and Experience

Specific aspects of the firm's experience and philosophy that merit City's consideration during the proposal evaluation process should be included.

e. Reference

The names, addresses, and telephone numbers of three (3) former or current clients who have contracted with the Contractor for services similar to those described in this Request for Proposals. Provide a contact person, telephone number and email address. The City reserves the right to contact clients for reference. A description of similar projects that were successfully completed by the Contractor may be included in this section. Samples of similar work described in this section shall be attached.

f. Qualifications

- i. Contractor shall have no outstanding or pending complaints as determined through the State of California Department of Consumer Affairs.
- ii. Contractor must be licensed to operate public transportation in the State of California, pursuant to the requirements of applicable Local, State, and Federal ordinances, regulations, and statutes.
- iii. Contractor shall submit with their proposal, a summary of technical competence and qualifications of the firm, based on similar services provided to government entities by the Contractor.
- iv. Contractor shall have a minimum of five (5) years previous experience in providing public transit services.
- v. Contractor must have the proper operational resources and personnel to provide the services and to meet all requirements of this RFP.

**2. Scope of Services**

Provide a description of the approach and methodology to be used to provide the required transit services. Provide any relevant examples of previous work and/or review for any/all of the desired goal areas. See Attachment A for specific scope of services to be accomplished under this contract.

a. Services Needs Summary

Summarize the Contractor's understanding of Calabasas' needs and the proposed strategy for meeting those needs. Proposed changes to current operating practices should be identified in this section.

b. Service Plan

This section should detail the Contractor's understanding of Calabasas' needs, and commitment to fulfilling those needs. Where changes to current operating practices are proposed, those changes should be fully documented.

- i. Fixed Route – The proposal should identify how the service will be provided and discuss any technology elements that the Contractor is proposing.
- ii. Communications – Describe how the Contractor will communicate with and dispatch drivers in the course of their duties. This includes:
  1. Radio
  2. Telephone
  3. Internet and Intranet
  4. Print Communications
- iii. Customer Information – How will communications systems be used to keep customers informed about the system?
  1. General information
  2. Status of trip requests
  3. Emergency information
- iv. Contractor and Staff Training – Fully describe all training programs that will be implemented (see Attachment A)
- v. Administration and Operational Resources – Summarize the administrative and operational resources plan by position code and number of employees planned for each code.
- vi. Customer Service and Complaints – How will the City's requirements be satisfied?

- vii. Safety – How will the Contractor satisfy State, Federal, and City safety requirements?
- viii. Startup and Transition Plan – The Contractor should identify issues that will be encountered during the service startup phase and how they will be addressed. These will include:
  - 1. Administrative offices – Has the Contractor secured office space that is located within or near the City? If so, where is it located? If not, how will the firm go about securing adequate facilities? A full description of appropriate facilities should be included in this section.
  - 2. Summarize the hiring plan, and how the Contractor will ensure that: experienced, motivated, and knowledgeable employees are ready to provide service on the first day.
    - a. Verification that all staff has cleared background checks to work with children.
  - 3. How will the Contractor coordinate with the current Contractor during the transition period?
- ix. Coordination with City staff – How will Contractor ensure that timely and candid two-way communications are maintained with City staff throughout the duration of the contract? How will the Contractor ensure that the fee at risk included in the contract is fully earned?
- x. Reporting – How will Contractor ensure any and all necessary reporting is provided to City in an efficient manner while maintaining the highest level of accuracy? And provide the following items:
  - 1. Preventative Maintenance Checklist
  - 2. Daily Vehicle Inspection Checklist

### **3. Implementation Timeline**

Please describe the critical path and milestones you will observe when preparing for the service startup date.

### **4. Labor Hours**

Provide a preliminary scope of services and estimate the labor hours separated by task to fulfill requirements as laid forth in the scope of services. Provide information regarding your firm's current staffing, current workload, and availability to provide the subject services in a consistent and reliable manner.

Provide information regarding a system that will be put into place if the initial system is non-operational or overloaded. This includes backup vehicles, personnel, or other pertinent system requirements to be provided at an acceptable cost. Provide information on maximum response time available for riders to continue on their destination. Describe how routes will be covered should there be call-outs, inoperable equipment, or another unforeseen event.

### **5. Statement of Economic Interest**

The Contractor shall disclose any financial, business or other relationships with the City that may have an impact on the outcome of this contract. The Contractor shall also list current clients who may have a financial interest in the outcome of this contract (see Attachments C and D).

## **6. Fee Schedule**

The City has determined that the proposed program is subject to the provisions of Labor Code § 1720 thereby requiring the Contractor to pay the prevailing wage rates for all work performed under the Contract. Accordingly, the proposed project is subject to compliance monitoring and enforcement by the California Department of Industrial Relations.

- a. The fee schedule shall be submitted for the Contractor services outlined in the scope of work. The basis of payment for the services provided under this agreement shall be a maximum not-to-exceed fee. The fee proposal shall be identified for each phase of review.
- b. The proposals submitted for transportation services should be for all transportation programs included in Attachment A. Companies must bid on an hourly service format per program since additional services will be billed to the City at an hourly rate per program.
- c. Provide a sample invoice for one month of service utilizing the information provided in this request.

## **7. Submittal**

The Statement of Qualification and Fee Schedule shall be transmitted with a cover letter that must be signed by an official authorized to bind the Contractor contractually, and shall contain a statement that the proposals are valid for a one hundred twenty (120) day period. The letter accompanying the Statement of Qualifications shall also provide the following: name, title, address, and telephone number of individuals with the authority to negotiate and contractually bind the Contractor. The cover letter constitutes certification by Contractor, under penalty of perjury, that the Contractor complies with nondiscrimination requirements of the State and the Federal Government. An unsigned proposal or one signed by an individual unauthorized to bind the Contractor may be rejected.

## SECTION III: GENERAL PROPOSAL TERMS AND CONDITIONS

### **1. Communications Regarding RFP**

If a Contractor is in doubt as to the true meaning or intent of any part of the Contract Documents, they may submit to Tra'a Bezdecny, via email ([tbezdecny@cityofcalabasas.com](mailto:tbezdecny@cityofcalabasas.com)), a written request for an interpretation or a correction thereof. Interpretation or corrections of the Contract Documents shall be made only by addendum duly issued by Tra'a Bezdecny, a copy of such addendum will be made available on the City webpage at: <http://www.cityofcalabasas.com/public-notices.html>. Such addendum shall be considered a part of, and incorporated in, the Contract Documents. All timely requests for information submitted in writing will receive a written response from the City.

### **2. Contract Requirement**

The Contractor to whom the contract is awarded shall execute a written contract with the City within ten (10) calendar days after Notice of Award has been sent by mail to the Contractor at the address given in the Proposal. The contract/agreement shall be made in the form adopted by City and incorporated in these specifications. The Contractor represents that they possess, or have arranged through subcontracts, all capital and other equipment, labor and materials to carry out and complete the work hereunder in compliance with all Federal, State, County, City and Special District Laws, Ordinances, and Regulations, which are applicable.

### **3. Contract Assignment**

The Contractor shall not assign, transfer, convey, or otherwise dispose of the contract, or its right, title or interest, or its power to execute such a contract to any individual or business entity of any kind without the previous written consent of the City of Calabasas.

### **4. Non-Discrimination**

In the performance of the terms of this contract, the Contractor agrees that it will not engage in, nor permit such subcontractors as it may employ to engage in, discrimination in employment of persons because of age, race, color, sex, national origin, or ancestry, or religion of such person(s).

### **5. Payment Terms**

The City's payment terms are 30 days from the receipt of an original invoice referencing the City's PSA and acceptance of the services.

### **6. Ownership of Reports and Data**

The originals of all studies, reports, exhibits, documents data and/or material(s) prepared and/or used to comply with any section/condition of these specifications, plus any copies of same required by the agreement to be furnished to the City, shall be deemed to be public records which shall be open to inspection by the public and, as such, shall become and remain the Property of the City.

### **7. Modification or Withdrawal of Submittals**

Any proposal received prior to the date and time specified for receipt of proposals may be withdrawn or modified by written request of the Contractor. To be considered, however, the modified proposal must be received by the time and date specified.

### **8. Property Rights**

Proposals received within the prescribed deadline become the property of the City and all rights to the contents therein become those of the City.

**9. Confidentiality**

Prior to award of the contract, all proposals will be designated confidential to the extent permitted by the California Public Records Act. After award of the contract, or if not awarded, after rejection of all proposals, all responses will be regarded as public records and will be subject to review by the public. Any language purported to render confidential all or portions of the proposals will be regarded as non-effective and will be disregarded.

**10. Amendments to Request for Proposals**

The City reserves the right to amend the Request for Proposal by addendum prior to the final proposal submittal date.

**11. Contract Term**

This contract will cover services provided from the date the contract is signed by all parties through the completion of the Services, and may be extended upon mutual consent of the parties. The fee proposed by Contractor must be valid for the entire period unless otherwise conditioned in the Proposal.

**12. Insurance**

The Contractor shall meet the insurance requirements as outlined in the Professional Service Agreement, Section 11: Insurance.

**13. Non-commitment of Department**

This Request for Proposal does not commit the City to award a contract, to pay any costs incurred in the preparation of a Proposal for this request, or to procure or contract for services. The City reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with any qualified company or to modify or cancel in part or in its entirety the Request for Proposal if it is in the best interests of the City to do so.

**14. Public Domain**

All products used or developed in the execution of any contract resulting from this Request for Proposal will remain in the public domain at the completion of the contract.

**15. Termination**

The City reserves the right to terminate this agreement upon thirty (30) calendar days from written notice to the Contractor.

**16. Required Timeframes**

The Contractor office hours shall be open from 7:30 a.m. to 5:30 p.m., Monday through Friday, excluding City holidays, so that the Contractor will be available to City staff.

**17. Statement of Economic Interest**

In accordance with California Government Code Section 87306, the Contractor awarded a contract may be required to file a Statement of Economic Interest, Form 700. If such requirement is made, the filing must be no later than 30 days after the execution of the contract, annually thereafter prior to June 30th of each year for the duration of the contract, and within 30 days of termination of the contract. Failure to file any required statements will result in withholding payment for services rendered (See Attachment C).

**18. Inspections**

City reserves the right to inspect the work being accomplished by the Contractor at any time.

**19. Prevailing Wage**



*Request for Proposal  
Public Transportation Services*

The City has determined that the proposed program is subject to the provisions of Labor Code § 1720 thereby requiring the Contractor to pay the prevailing wage rates for all work performed under the Contract. Accordingly, the proposed project is subject to compliance monitoring and enforcement by the California Department of Industrial Relations.

## SECTION IV: EVALUATION AND SELECTION

**Proposals must be submitted by email on or before 2:00 p.m. on April 29, 2024. Proposals received after the date and time specified will not be considered.** Electronic Submittals must be received in the e-mail box listed below. Submittals sent to any other box will NOT be forwarded or accepted. Please use the Delivery Receipt option to verify receipt of your email.

E-mail - [tbezdecny@cityofcalabasas.com](mailto:tbezdecny@cityofcalabasas.com)

Proposals submitted to City must comply with and contain all of the information requested in this RFP. The selected companies must sign an agreement with the terms and conditions shown in the Professional Services Agreement, (Attachment A). Firms are encouraged to promptly notify the City of any apparent inconsistencies or ambiguities found in the scope of services so that an appropriate amendment may be issued. The subject line of the email shall be:

### **“Request for Proposal for Public Transportation Services”.**

The City will accept proposals from firms having specific experience, resources and qualifications in the proposed scope of services. Proposals for consideration for this project must contain evidence of the firm's experience and abilities in the specified area and other disciplines directly related to the proposed services. Other information required by the City to be submitted in response to this RFP is included elsewhere in this solicitation.

A selection committee will review and evaluate all accepted proposals, and may conduct oral presentations or a combination of both, unless otherwise indicated in this solicitation. The selection committee will have only the response to this solicitation to review for selection of finalists and, therefore, it is important that Contractors emphasize specific information considered pertinent to the services to be provided. Evaluation of the responses will be based on the following criteria:

- Adequacy of proposed approach to the tasks described in Scope of Services
- Experience and qualifications of Contractor to perform tasks described in this RFP
- Adequacy of operational resources and personnel to provide the services in this RFP
- Cost

The company rated as most qualified to provide the requested services will be invited to negotiate a final contract. If an agreement is not reached, negotiations may be terminated and commenced with the next most qualified company.

The award of the contract will be based on a combination of all of the above factors. The City reserves the right to reject any and all proposal.

A Sample Evaluation scoring is provided below. Contractors are encouraged to utilize this to ensure a complete proposal.

Item	Description	Weight
Approach and Deliverables	Proposers are scored on their response to each of the tasks identified in the Scope of Services	20%
Experience, Qualifications, and References	Proposers are scored on the experience of the company and its staff, their qualifications related to providing transit services, and information provided by their references	30%
Operational Resources	Proposers are scored on their financial and operational resources	20%
Cost		30%

## ATTACHMENT A: SCOPE OF SERVICES

### **1. Project Scope:**

The operation of the Calabasas Shuttle Program consists of the following:

- The operation of the Calabasas Transit Program currently consists of the following:
- Seven (7) fixed-route lines (see Attachment **D: Routes**)
  - One (1) Citywide fixed transit route within Calabasas City Limits
  - Four (4) peak-service routes during a.m. and p.m. peak transit demand (tripper service)
  - One (1) summer fixed-route Weekend Trolley (Memorial Day to Labor Day)
  - One (1) summer fixed-route Beach Bus (10-week operation)
- Special Events
  - Periodic and random special events occur throughout the year requiring transportation. Information for these events will be provided on a quarterly basis and no less than 30 days prior to the event.
- Maintenance
  - Nine (9) Shuttle Busses
    - Three (3) Gasoline
    - Two (2) Diesel
    - Four (4) CNG

Insurance requirements for running transit services:

- \$1,000,000 for Comprehensive General Liability
- \$5,000,000 (per occurrence) for Auto Liability.
- \$1,000,000 for Worker's Compensation
- \$1,000,000 for Pollution Liability

### Bid Schedule

Item	Description	Unit	Quantity (Annual)	Unit Cost	Item Total Cost
<b>Driver Hours</b>					
1	Line 1 Fixed Route	Hours			
2	Peak Service Route #2	Hours			
3	Peak Service Route #3	Hours			
4	Peak Service Route #4	Hours			
5	Peak Service Route #5	Hours			
6	Trolley	Hours			
7	Beach Bus	Hours			
8	Allowance for Special Events (City-controlled)	Hours	250		
<b>Maintenance to be Provided by Contractor (Section 4)</b>					
9	Maintenance – Oil Changes	EA	40		
10	Maintenance – Tire Rotation	EA	40		
11	Maintenance – Engine & Cabin Air Filter Change	EA	20		
12	Maintenance – Other Fluids (Top-off or Change)	EA	20		
13	Maintenance Allowance – City-controlled (Towing, etc.)	LS	1	\$5,000	\$5,000
14	CNG Fueling Allowance – City-controlled (Section 6.9)	LS	1	\$75,000	\$75,000
15	Cleaning (Section 4)	LS	1		
<b>Administration (Overhead, Office Staff, Customer Support, Invoicing, Revenue Tracking)</b>					

16	Transit Administration (Refer to Sections 2 & 3 below)	LS	1		
17	Reporting (All Required Reporting)	LS	1		
<b>Year 1 Total</b>					
18	Year 2 Increase	%	Year 2 Total		
19	Year 3 Increase	%	Year 3 Total		
<b>Grand Total (3 Year Base Contract)</b>					
20	Year 4 Increase (upon City approval of extension)	%	Year 4 Total		
21	Year 5 Increase (upon City approval of extension)	%	Year 5 Total		
<b>Grand Total (5 Year Contract w/extension)</b>					

City reserves the right to reduce, eliminate, or modify route services at any time during the contract

## **2. General Contractor Responsibilities:**

Contractor shall be responsible for the management and operation of the Calabasas Shuttle Program and any optional services purchased by City. Contractor shall manage service in accordance with the guidelines and parameters established herein and the attachments hereto. The omission of a duty or responsibility herein below shall not relieve Contractor of its obligation to perform such duty or accept such responsibility, so long as it is usual, customary and generally accepted with the public transportation industry as being an integral element of operating a transit service.

All facilities, equipment, and services required in the operation and management of said services shall be furnished by Contractor unless specifically identified to be contributed by City in this RFP.

Contractor shall coordinate, manage, and control all necessary program activities which shall include: maintain all vehicles, provide vehicle Contractors and all project personnel, train personnel as necessary, develop administrative procedures, compile financial and non-financial records, and develop methods to improve effectiveness and maximize service efficiency.

Contractor will obtain and provide all required federal, state, and local approvals and permits and will ensure that all vehicle Contractors are properly licensed for the services they are providing. Contractor must also have all applicable state and local business licenses or procure same prior to the start of service. City will provide vehicle licenses and registrations.

## **3. Legal & Regulatory Requirements:**

### **3.1 Drug and Alcohol Testing:**

The Contractor will be required to comply with FTA drug and alcohol testing regulations in compliance with FTA Master Agreement Section 40, and with other drug and alcohol testing rules and regulations as may be required by the FTA. The Contractor will provide City with any necessary information and documentation in a timely manner to enable City to comply with FTA reporting requirements.

### **3.2 Americans with Disabilities Act:**

All service provided by the Contractor on behalf of City shall comply with the applicable requirements of the Americans with Disabilities Act (ADA). The Contractor will submit for City's review and approval an ADA program and documents used for driver ("Operator") training.

### **3.3 Reporting:**

The City is required by Los Angeles County Metropolitan Transportation Authority (Metro) guidelines to submit accurate data to Metro for multiple reporting submittals throughout the year to the Federal Transportation Administration (FTA). The City participates in these programs with both the Shuttle and Dial-A-Ride programs. The City is subject to significant financial penalties for failure to report auditable data.

The Contractor is responsible to become familiar with all reporting requirements for the Calabasas Shuttle program and to supply accurate financial and operating data which complies with the above described requirements. The City's monthly report requirements have been structured to ensure the collection of data required for the reports; however, the type of information and the reporting format is changed by the FTA on a regular basis. The Contractor shall work with the City to keep up to date on all reporting requirements. This will require Contractor staff to attend meetings with City staff hosted by Metro.

Contractor shall be required to work with City to prepare for the audit; this includes, but is not limited to, pre-audit meetings to ensure all records are current and available. Contractor will also be responsible for meeting with the auditor(s) and making all records available.

### **3.4 Title VI Requirements:**

The City is required by Metro to submit triennial Title VI Reports, indicating the City does not discriminate in its provision of services based on race, color, or national origin. The Contractor agrees to abide by the policies set forth in the City's Title VI Notice to Beneficiaries, Public Participation Plan, and Service Standards and Policies document as applicable. A copy of the City's current Title VI Program can be found on the City's Website at <https://www.cityofcalabasas.com/government/public-works/transportation-transit/public-transit-services/civil-rights-program>.

### **3.5 Other Federal Requirements:**

The City of Calabasas is a recipient of Federal Transit Administration (FTA) funding for both capital and operating expenses. As a result, the Contractor agrees to comply with all federal regulations as applicable, necessary, or required. Compliance may be audited, and Contractor shall be required to retain and provide any and all records proving compliance.

### **3.6 Other State Requirements:**

The City of Calabasas is a recipient of State funding for both capital and operating expenses. As a result, the Contractor agrees to comply with all state guidance and regulations as applicable, necessary, or required. Compliance may be audited, and Contractor shall be required to retain and provide any and all records proving compliance.

### **3.7 Other Local Requirements:**

The City of Calabasas is a recipient of Metro and Local Return funding for both capital and operating expenses. As a result, the Contractor agrees to comply with all local guidance and regulations as applicable, necessary, or required. Compliance may be audited, and Contractor shall be required to retain and provide any and all records proving compliance.

NOTE: Contractor shall be liable for the cost of any funding penalties imposed on the City or loss of funds that the City would have otherwise received due to the Contractor's failure to comply with any of the above mentioned reporting requirements.

#### **4. Maintenance Requirements:**

Vehicles provided for revenue service of the Calabasas Shuttle Program are owned by the City. All vehicles and vehicle equipment required by this RFP shall be maintained by the Contractor in good repair and in a condition satisfactory to the City. The Contractor shall assume all responsibility for the proper maintenance of the vehicles. The Contractor will be responsible for licensing of this equipment and must comply with all applicable federal and other statutes and regulations governing its use.

It shall be the expressed responsibility of the Contractor to assume all coordination with the original manufacturer of the vehicles and equipment used for service operations if necessary to keep the vehicles and equipment in safe and good operating condition; this applies to any City-owned, Contractor-owned, or leased vehicles. This shall include negotiating and processing all vehicle warranty claims through the manufacturer's own warranty department, and responsibility for collection of any monies, extended warranties, or credits as a result, for the length of time the warranty is in effect.

Proposers experienced in operating and maintaining alternative fuel vehicles should indicate so in their proposal. The City currently owns vehicles fueled by compressed natural gas (CNG), diesel, and unleaded gas and has a Zero-Emission Vehicle Plan in place which calls for the introduction of electric vehicles during the proposed contract period.

Contractor shall perform the duties and accept responsibilities set forth below in connection with the maintenance and repair of Revenue and Non-Revenue Vehicles, Equipment, and Facilities. All non-revenue vehicles, equipment, tools, spare parts and facilities required to operate the service will be provided by the Contractor.

Contractor shall not defer maintenance and repair for reasons of shortage of maintenance staff or operable buses, nor shall service be curtailed for the purpose of performing maintenance and repair without prior written consent of the City. Contractor shall adjust the work schedules of employees as necessary to meet all scheduled services and complete preventive maintenance and repair activities to the schedule approved by the City.

The City will not be responsible for payment of any traffic or parking ticket fines incurred by any of the Contractor's employees. Contractor shall be responsible for the total cost of repairing physical damage to buses that occurs under Contractor's control, whether or not Contractor's employees were at fault.

##### **4.1 Preventative Maintenance:**

The Contractor shall be responsible for the preventative maintenance of all vehicles. Preventative maintenance inspections must occur every 45 days or 3,000 miles, whichever comes first. These inspections must be completed in compliance with Federal Preventative Maintenance Inspection requirements and be reported to City monthly.

#### **4.2 Daily Vehicle Servicing:**

The Contractor shall perform and record daily vehicle servicing on all vehicles used in revenue service. Contractor shall detail in the Work Plan what daily servicing will occur in order to maintain vehicles in proper working condition.

#### **4.3 Vehicle Cleaning:**

The Contractor shall maintain vehicles in a clean and neat condition at all times. A record of interior and exterior vehicle cleaning shall be maintained in the Maintenance Manager's office, or other designated maintenance shop location, and reported to City monthly. At a minimum, the following cleaning procedures must be completed during the intervals as noted, or as otherwise deemed required.

##### **4.3.1 Daily Cleaning:**

- Vehicle Sweeping
- Litter and Debris Removal
- Spill Cleaning
- Interior and Exterior Graffiti Removal

##### **4.3.2 Weekly Cleaning:**

- Exterior Washing
- Interior Vehicle Cleaning (unless needed more frequently)
- Window replacement if glass is scratched (if the glass is broken or cracked, it must be repaired/replaced immediately)

##### **4.3.3 Quarterly Cleaning:**

- Deep Cleaning
- Waxing

##### **4.3.4 As Needed Cleaning:**

- Fumigation
- Seat Cleaning or Replacement

#### **4.4 Mechanic:**

All mechanics need to have any applicable certifications required to perform work associated with maintenance of the fleet. The Contractor shall provide technical training of maintenance and repair personnel necessary to ensure a consistent level of current, thorough knowledge in the maintenance and repair of the vehicles, including air conditioning systems, wheelchair lifts/ramps, electronically controlled engines and transmissions, CNG engines, and other ancillary equipment.

#### **4.5 Demand Maintenance:**

The Contractor shall be responsible for the maintenance and repair of all vehicles, communication systems, and all other equipment, furnishings and accessories required in connection with its operation of the service in a clean, safe, sound, and proper operable condition at all times and fully in accord with any manufacturer recommended maintenance and repair procedures and specifications, as well as with the applicable requirements of any federal, state or local statute. All repairs shall be performed by Contractor or by other vendors and suppliers designated by the Contractor. Repairs shall include,

but not be limited to, work to correct loss or damage; adjustments due to normal wear and tear; and overhaul, rebuilding, or replacement of components (i.e. lubrication, brakes, tires, and other soft components to vehicles). Repair work shall be conducted as soon as practicable upon learning that such work is required.

The City of Calabasas shall be responsible for all costs associated with major repairs including but not limited to the following: engine, transmission, and major drive train components. All repairs and parts shall pertain to the manufacturer's warranty.

**4.6 Mechanical Road Calls Response Time:**

The Contractor shall be responsible for dispatching a replacement bus within 10 minutes in the event a vehicle deployed for or in-revenue service becomes disabled due to mechanical breakdown or accident. If the delay of service is 20 minutes or longer, the Contractor shall notify the City's Transit Manager via the agreed upon communication protocol.

**4.7 Vehicle Towing:**

In the event that towing is required due to mechanical failure or damage, the Contractor shall be responsible to provide towing at the City's expense (see line item 13 above).

**4.8 Maintenance Records:**

As required by California Code of Regulations 13 (13 CCR), the Contractor shall maintain a current vehicle file in chronological order. At a minimum, the following information must be kept in this file:

- Maintenance Repair Work Orders
- Preventive Maintenance Schedule Reports
- Contractor's Defect Report (Pre-operation and Maintenance Record cards)
- Report of Trouble
- Quality Assurance Inspection Reports
- CHP Terminal Inspection Reports
- Vehicle Smoke Emissions records

All maintenance work orders and report files shall become a permanent part of the Contractor's file. Records shall be made available to the City or its representative monthly, and the California Highway Patrol and/or such other regulatory agencies with jurisdiction when requested. Original copies of all such records shall remain on file at all times at the Contractor's local facility. Contractor shall provide the original copies to the City at the termination of the Agreement.

**4.9 Vehicle Systems:**

**4.9.1 Wheelchair Lift/Ramp/Securement Systems:**

The Contractor will ensure that wheelchair lifts, ramps, and securement systems are operational on all vehicles in the fleet. All broken systems must be repaired within 24 hours.

**4.9.2 Climate Control:**

Contractor shall maintain the heating and air conditioning units in proper working condition so that they are available at any time during the service hours and offer the most comfortable environment inside the vehicle regardless of the outside climatic conditions. Contractor shall require that drivers continually monitor climate control units during the day to ensure that they are operating properly. In-

service vehicles without working heating or air conditioning will be exchanged within one round trip or sooner. In April of each year of the contract, Contractor will provide the City's Transit Manager with a schedule for inspection of air conditioning units to ensure they are ready for late spring and summer heat conditions.

**4.9.3 Fare/Passenger Collection:**

The City is responsible for selling annual passes and/or individual tickets to the public. The drivers must verify that every passenger presents a pass and or a shuttle ticket at the time of boarding the buses. The drivers shall not accept money as a form payment for the fare.

**4.9.4 Real-Time Transit Vehicle Arrival Information Systems:**

The Contractor shall maintain the City's Real-Time Information Systems and ensure proper use by drivers of the system.

**4.9.5 Fire Suppression Equipment:**

Contractor is responsible for obtaining regular certifications as required for fire extinguishers and fire suppression equipment installed on the vehicles in the fleet.

**4.9.6 Bike Racks:**

Contractor is responsible for replacing any bike rack damaged during the Agreement. Contractor shall maintain a sufficient spare parts inventory to ensure that racks damaged are replaced within two (2) weekdays.

**4.9.7 Engine, Transmission, and Differential:**

Contractor shall be responsible to monitor the condition and performance of vehicle engines, transmissions and differentials so as to maximize useful life and avoid costly catastrophic failures. At a minimum, the Contractor's monitoring and reporting program shall consider miles accumulated; fuel, oil transmission fluid and differential oil consumption trends; loss of power; and erratic performance.

**4.10 Body Damage:**

Contractor is responsible for repairing all vehicle body damage in a timely manner. Should the vehicle need extensive body repairs, the Contractor shall provide the City with a timeline for the repairs to be completed. Normal body damage must be repaired within 72 hours of occurrence.

**4.11 Revenue Vehicle Paint & Decals:**

All vehicles utilized in the fixed-route fleet are required to have each service's logo/decal on them and the approved artwork as well. The City will provide the paint color-scheme, logo/decal design, and artwork for each service as needed. Contractor is responsible for the expense of the fabrication of these items and placing Contractor's logos/decals on the vehicles. Contractor shall be responsible for the maintenance and upkeep of the logo/decal and artwork on the vehicles. Vehicles currently in service already have the required logo/decal and artwork and current Contractor logo and information. For any additional vehicles provided by the Contractor, the City will work with the Contractor to identify the equipment for the vehicle including but not limited to headsigns, ad racks, schedule holders, and bike racks, as required.

Contractor must paint all damaged vehicles to match the original color scheme. Contractor shall also procure a supply of decals to replace any damaged decals during the term of the Agreement.

#### **4.12 Inspections:**

##### **4.12.1 City Vehicle Inspections:**

City shall have the right to inspect any and all vehicles or cause same to be inspected at any time, with or without prior notice to Contractor, provided, however, that unless City determines in its sole discretion that emergency conditions or factors affecting safety or security require otherwise, City shall give at least 24 hour notice of any such inspection.

##### **4.12.2 CHP Terminal Inspection:**

The Contractor must make all vehicles available for inspection by the California Highway Patrol (CHP) as necessary. The Contractor must also follow CHP maintenance record guidelines and make all records available for inspection. The Contractor must notify the City within 24 hours when a CHP inspection has occurred.

#### **4.13 Return of Revenue Vehicle Audit:**

At least thirty (30) days prior to the termination date of the Agreement, the City, the Contractor, and the new Contractor (if any) taking over operations and maintenance responsibility, shall participate in a revenue vehicle audit. The audit will be performed by an independent Contractor, selected by the City, which is experienced in transit vehicle operations and maintenance and vehicle inspections. This audit will occur regardless of whether a new contractor is taking over operations and maintenance. The Contractor shall pay all costs associated with hiring the audit Contractor.

The audit will establish the condition of the Revenue Vehicle fleet, as of the audit date, and to determine the specific repairs and maintenance that needs to be performed, by vehicle, in order to assure that all Revenue Vehicles will meet the vehicle condition requirements specified in the Agreement. The Contractor shall be solely responsible for promptly completing all repairs and/or maintenance identified in the audit as necessary to meet such vehicle condition requirements; and shall also be solely responsible for the cost of all such repairs and maintenance. If at the time there are also leased vehicles being used for revenue service, where applicable, these terms shall also apply to the leased vehicles, unless otherwise covered in the lease agreement.

### **5. Facility Requirements:**

#### **5.1 General Requirements:**

Contractor shall establish and maintain its operations headquarters at the Contractor's supplied operations and maintenance building. Contractor shall, as an integral part of the operating headquarters, equip and furnish the office, dispatch area, operator, training, and maintenance areas with all equipment required to conduct business. Contractor must disclose any other transit services which they intend to operate out of the chosen facility.

#### **5.2 Administrative Offices:**

The Administrative Offices must, at a minimum, have the following components:

- Key Personnel Offices
- Dispatch Area
- Driver Room

- Meeting Area for ten (10) or more people

#### **5.3 Maintenance Area:**

Contractor shall provide a facility with sufficient repair bays to maintain the vehicle fleet. The facility must meet all requirements for the maintenance of all vehicles, including any special requirements for CNG and electric vehicles. Contractor shall equip the facility with all the tools, equipment, and spare parts necessary for the maintenance and repair of Revenue and Non-Revenue Vehicles in accordance with the Agreement.

#### **5.4 Vehicle Parking and Deployment:**

The City is currently storing all its vehicles at a City-owned Old Town Park-and-Ride on Calabasas Road between Park Granada and El Canon Avenue. The Contractor may continue to use this site to park City vehicles. The Contractor shall provide a parking plan of fleet to the City upon award of Agreement. Such plan may propose a different site if available to the Contractor. The City reserves the right to store the vehicles at a different location within the City of Calabasas.

Contractor is responsible for addressing employee parking. Contractor employee parking must abide by all parking regulations and will not receive any exemptions.

#### **5.5 Communication Equipment:**

At a minimum, Contractor must ensure that phone and internet services provided are sufficient to effectively and efficiently support the shuttle system. Contractor must have the following phone and Internet services available from their facility:

- Phone Lines- Sufficient number of phone lines for Contractor's internal and customer service functions.
- Computer Network- Contractor shall have a standing (fixed) IP address and coordinate with City to have the address added to the City's Firewall. Contractor is required to have high-speed internet that will allow for the Transit Vehicle Arrival Information System to be used properly by Contractor.

During the duration of the contract, the City may provide city-owned and maintained fare collection and route management hardware and software. The City will be responsible for the installation of any such equipment. The Contractor's drivers and staff shall operate the equipment and the City would provide the required training.

### **6. Vehicle Operator:**

Contractor will operate Calabasas shuttle services as specified by City and in strict accordance with the operating schedules and routes set forth in this document, and shall provide such service in a safe, professional, and courteous manner. Contractor shall ensure a sufficient number of operators, both regularly-scheduled and extra board (cover or relief), to provide consistent and reliable service.

#### **6.1 Vehicle Operator Requirements:**

##### **6.1.1 Proper Licenses:**

All Operators must have a current, valid Class B license with Passenger Endorsement, a current Transit Training Certificate (VTT), and Medical Card. In addition, at least one office staff member on duty must have all above licenses and certifications.

**6.1.2 Contractor ID Cards:**

Operators must always wear a shoulder patch on the right arm, easily visible to boarding passengers, which contains the following: Employee Name or Employee Number, and Contractor Name. This requirement further applies to any shirt, sweater, or jacket worn on the outermost layer by an operator.

All Contractor employees must be clearly identifiable at all times while providing services under the Agreement.

**6.1.3 Drug and Alcohol Testing:**

Contractor shall develop, implement, and maintain an employee alcohol and substance abuse testing program, subject to the City or its representative approval, for all employees in safety-sensitive positions including personnel engaged in the operation, maintenance and repair, and control of vehicles and equipment. Such program will comply with all applicable requirements as established by the Federal Transit Administration or by other federal or state agencies, including regulations promulgated to implement the Omnibus Transportation Employee Testing Act of 1991.

**6.1.4 Background Check:**

Contractor shall use appropriate employee screening and selection criteria to assure the employment of the best qualified applicants available, emphasizing competence, courtesy, reliability and good customer service skills. It is also important to the City that employees can communicate in English with customers and complete written reports in a clear, concise, and legible manner. These criteria shall include but not be limited to checking an applicant's driver's license records through the California Department of Motor Vehicles, pre-employment physical examinations, and drug/alcohol screening tests.

Contractor shall make all reasonable efforts to ensure that employees having contact with the public in the course of their duties are of good moral character. Any such employee who is convicted of a felony or of a crime involving moral turpitude during the time of their employment shall not be permitted to continue to hold a position of employment involving contact with the general public. Contractor shall conduct a "Live Scan" DOJ & FBI check to determine criminal background of employees. The background checks must be completed prior to hiring and every two years by the Contractor.

At change of Contractor, or at any point during the term of this Agreement, the City reserves the right to review all employees who may be retained from the old Contractor and to ask they be reassigned to other duties within the Contractor's organization if the City believes, based on past performance, the employee is not well-suited for the duties required in their current position.

**6.2 Vehicle Operator Responsibilities and Procedures:**

**6.2.1 General Duties:**

In addition to the safe operation of the vehicle, Operators must also perform the following general duties:

- Operate wheelchair lift and secure wheelchair passengers.

- Record passenger counts.
- Change Destination Sign information as needed.
- Data collection as necessary.
- When requested, provide passenger assistance during boarding or alighting.
- Other duties as necessary.

#### **6.2.2 Communication Skills:**

Operators must uphold the City's high-quality customer service expectations by performing the following duties:

- Effectively communicate using English both verbally and in writing as solely determined by the City.
- Provide assistance to passengers of limited English proficiency, including directing such passengers to where they can receive more information regarding Calabasas's shuttle service.
- Proactively communicate with passengers to disclose, explain, or answer questions about unscheduled stops, recovery points, driver switches, or other interruptions to service, including the approximate amount of time each occurrence will last.
- Proactively communicate with passengers when passengers board a bus that is either going out of service or completing its last trip of the day.

#### **6.2.3 Distribution of Materials:**

Operators will, when requested by the City, hand out notices to passengers or otherwise render assistance in customer relations, promotion, marketing, monitoring and supervisory functions.

#### **6.2.4 Pre-Trip Inspections:**

Operators must conduct a Pre-Trip inspection prior to taking a vehicle into revenue service. The inspection must meet the federal and state requirements for commercial vehicle inspections. Contractor must allow sufficient time to conduct this inspection without delaying scheduled revenue service. Contractor must provide pre-trip records to City monthly.

#### **6.3 Operator Uniforms:**

The City and the Contractor shall agree upon a standard uniform. Operators shall be in uniform at all times while in service or otherwise on duty. Contractor shall provide Operator uniforms to its employees. Contractor shall be responsible to ensure that Operators wear these uniforms and maintain a neat and clean appearance while on duty.

#### **6.4 Safety:**

Operators are required to follow all local, state, and federal road, driving, and traffic laws, including but not limited to wearing a seatbelt and refraining from cell phone usage while the vehicle is in motion.

#### **6.5 Revenue Service:**

Contractor should differentiate between in-revenue service and out-of-revenue service when supplying any pertinent information per the FTA's definition of revenue service.

## **6.6 Lost and Found**

The Contractor is responsible for storing lost and found items in a secured location for 30 days. The Contractor will keep a log that has information about who found the item, where it was found, and the date and time it was found. After 30 days, the Contractor must donate any unclaimed items to a local charity and report this information to the City.

## **6.7 Operator Training and Performance:**

### **6.7.1 General Performance and Procedures**

The Contractor shall provide Operator training and retraining that shall meet generally accepted transit industry standards and in compliance with 13 CCR as it relates to transit bus vehicle laws and regulations. An outline of the training program, including periodic updates, shall be on file in the office of the City's Transit Manager. All Operators, dispatchers, customer information personnel, and supervisors shall participate in the program.

Driver training shall at a minimum include the following components:

- Vehicle Operation:
  - Includes training on vehicle orientation, safe bus operation and pre-trip inspections, route and schedules orientation, and on-time performance.
- Safe Vehicle Maneuvering
- Defensive Driving Training:
  - Program must include the National Safety Council's defensive driving instruction.
- Federal Drug & Alcohol Regulations:
  - All necessary employees shall be trained about the requirements contained in the DOT Drug & Alcohol regulations.
- General Vehicle Handling and Safety
- Passenger Assistance Techniques
- Passenger Relations, including knowledge of how passengers can file complaints
- Comprehensive knowledge of City's transit system including routes, stops, transfer locations with other agencies such as Metro and LADOT, and familiarity with key points of interest, and general route frequency and hours of operation for all City transit.
- Farebox Training, including full understanding of fare policies of the City
- ADA Requirements & Sensitivity Training:
  - All drivers must be trained to comply with Title II of the Americans with Disabilities Act (ADA) of 1990, and any additional ADA or Federal Transit Administration (FTA) training or testing that may be required by law.
- Usage of Transit Vehicle Arrival Information Systems components on vehicles

### **6.7.2 Route Training**

Each Vehicle Operator will be trained on each Route operated by the Contractor for the City. This training must include driving each Route completely in Non-Revenue and Revenue service with a Road Supervisor or Trainer. When service changes are made, Contractor shall ensure that all Operators are familiar with the new routes and/or schedules.

## **6.8 Schedule Adherence:**

### **6.8.1 Operating Ahead of Schedule – Fixed Route**

In the event that a route operates ahead of its scheduled time (a.k.a., “runs hot” or “early”), Contractor shall take all available steps to restore on-time performance. Contractor shall establish procedures, subject to City review and approval, to restore on-time performance while keeping service interruptions at a minimum. Contractor shall contact the City as soon as possible through the designated communication protocol of any service running ahead of schedule.

### **6.8.2 Operating Behind Schedule – Fixed Route**

In the event that a route operates more than ten minutes behind schedule, Contractor shall take all available steps to restore on-time performance. Contractor shall establish procedures, subject to City review and approval, to restore on-time performance while keeping service interruptions at a minimum.

Contractor shall contact the City as soon as possible through the designated communication protocol of any late or missed service. Failure to do so will result in Fines (Section 9.2).

## **6.9 Fueling:**

The City is in an agreement with the Malibu Canyon Shell gas station located on Las Virgenes Road to provide fuel for the City vehicles. The City receives invoices directly from the gas station. Should it become necessary for the Contractor to purchase fuel for vehicles, the City will reimburse the cost. The cost of the purchased fuel must be reflected on the monthly invoice to be paid by the City.

The Contractor shall make arrangements for fueling CNG busses. There are 4 fueling stations between 7 and 15 miles of City Limits that can be utilized. Contractor shall ensure no disruption to service due to fueling. The cost of purchased CNG fuel shall be billed to line item 14 above.

### **6.9.1 Travel Time:**

City will only pay for revenue service hours. City will not pay for time spent going to and from fueling facilities or time spent fueling vehicles. The City will audit and inspect the use of fuel by Contractor and shall deduct from payments due Contractor any fuel, at City's cost plus a charge for administrative overhead, provided by the City and not used for services hereunder.

The Contractor shall account for revenue time in accordance with procedures established for NTD reporting.

## **6.10 Exterior / Interior Advertising & Public Notices:**

The City reserves the exclusive right to place advertising material on the interior and/or exterior of the Revenue Vehicles. Contractor shall not install any advertising material on the interior or exterior of the bus except as directed by the City. Should the City choose to have an advertising program, the Contractor shall cooperate with the City’s advertising vendor and shall make reasonable efforts to allow the vendor to install and remove advertising at the Contractor’s maintenance facility.

The City of Calabasas does not own a transit operations and maintenance facility for its shuttle and Dial-A-Ride services. To date, the operations and maintenance facility has been provided by the contractor per their agreement with the City.

## **7. Management Responsibilities:**

### **7.1 Supervisor Responsibilities:**

#### **7.1.1 Accidents**

All traffic accidents involving transit system vehicles, regardless of injury, shall be immediately reported to the appropriate law enforcement agency. The City's Transit Manager shall be notified via the agreed upon communication protocol (email and/or phone) by Contractor of all accidents and incidents within four (4) hours. In cases involving injuries where person(s) are transported for medical attention, the Contractor shall notify the City's Transit Manager immediately.

The Contractor shall have an accident investigation program that identifies the roles and responsibilities of the individuals responsible for investigating accidents, including notification, response, and investigation. The accident investigation program must be designed to identify the root cause of accidents and provide a path to eliminate the root cause and prevent similar types of accidents in the future.

Contractor will request that the law enforcement agency respond to investigate the accident. Contractor will supply the City with copies of all accident and incident reports and photos within twenty-four (24) hours of the occurrence. Reports shall include, at minimum, line and route information, name of driver, actions leading up to, during, and after the accident, information for each passenger onboard, and information of how passengers made it to their final destination.

#### **7.1.2 Incidents**

Contractor is responsible for responding to passenger incidents. All incidents must be logged and a legible, concise corresponding report must be filed. City must be notified no later than close of the business day of an incident occurring with follow-up of any applicable Operator, Field Supervisor, and other incident reports electronically scanned and sent by email the following business day.

#### **7.1.3 Detours, Stop Closures, and Temporary Stops**

Contractor will deviate from established routes when necessary to avoid construction, detours, and vehicles or other obstructions within the public right-of-way. Contractor is responsible for routing of any detours and must post temporary out-of-service signs and/or temporary stop signs at stops as necessary. Contractor shall notify City by the agreed upon communication protocol (email and/or phone) of such obstruction-caused deviation(s) or stop closures as soon as is practicable upon learning that the deviations or stop closures are or may become necessary.

### **7.2 Dispatcher and Customer Service Representative Responsibilities:**

Contractor shall provide sufficient personnel during non-peak and peak hours of operation. Personnel shall be trained in customer service techniques and to be sensitive to the special needs of the elderly and individuals with disabilities. City and Contractor will arrive at a mutually agreed

upon protocol for answering the phone, including, but not limited to, the standard verbal greeting and how to handle placing customers on hold. Personnel shall have access to [tracking] software to provide efficient and concise information. Contractor shall report weekly a summary of all communication received.

#### 7.2.1 Telephone Service

Contractor shall provide trained personnel to answer telephone requests for service for fixed-route service. Contractor shall provide a phone system that includes multiple lines sufficient to handle the expected call volume, recording capability, and timing capability. Hold times may not exceed 60 seconds for any call. Personnel will be responsible for the following inquiries:

- Scheduling information
- Questions concerning delays
- Lost items
- General complaints

#### 7.2.2 Customer Service

The City will email all customer correspondence to the Contractor as they are received. The Contractor shall make at least three documented attempts to contact each customer filing a complaint within five calendar days in order to discuss the complaint and resolution if any. The Contractor shall also provide the complaint resolution to the City via the agreed upon communication protocol no later than five calendar days from receipt of the information.

Contractor shall report to the City all customer correspondence or complaints received directly to or at their offices. The Contractor shall inform the City within one working day of the communication and shall follow the procedures noted above for resolution of any complaints, including weekly reporting of correspondence.

Resolution of any customer complaints including employee discipline is the sole and complete responsibility of the contractor. Contractor shall notify the City of any discipline imposed on an employee which discipline arises from a customer complaint or any other issue directly related to the performance of this contract.

### **8. Safety and Emergency Procedures:**

Contractor shall assume full responsibility for ensuring that the safety of passengers, operations personnel, and all vehicles and equipment are maintained at the highest possible level throughout the term of the Agreement. Contractor shall comply with all applicable California Highway Patrol and OSHA requirements, including pull notices. Contractor shall furnish the City with copies of annual CHP vehicle/equipment inspections and CHP safety compliance reports within five working days of the inspection.

Contractor shall develop, implement and maintain, in full compliance with any applicable local, state, or federal regulations or requirements, a formal safety and accident prevention program including monthly safety meetings, participation in safety organizations, safety incentives offered by Contractor to Operators and other employees, and participation in risk management activities under the auspices of the Contractor's insurance carrier or other organization. Contractor shall

provide a copy of said Safety Program and subsequent program updates to the City or its representative.

Contractor shall participate in the State of California Department of Motor Vehicles “Employer Pull Notice Program” for appropriate monitoring of employee driver license activity.

Contractor will require all Operators, control room personnel, vehicle maintenance and repair mechanics, and supervisors to participate in the safety program and ensure all records are current and available.

#### **8.1 Accident, Emergency, and Incident Procedures – General:**

The Contractor shall be responsible for the enforcement of policies with regard to operational emergencies. The City may revise or establish additional policies. The Contractor shall notify through the City agreed upon communication protocol of each occurrence as soon as possible but no later than the end of the day of the occurrence, unless otherwise specified in this RFP. A written incident report will be transmitted to the City by the following business day. The Contractor shall be responsible for the handling and resolution of all operational emergencies and contingencies including, but not limited to, the following subsections.

##### **8.1.1 Hazardous Conditions**

Vehicle Operators shall report all hazardous road conditions or observed issues with furniture in bus zones (e.g., downed trees, missing or downed bus signs, graffiti on bus benches, malfunctioning signals, broken curbs at bus stops, etc.) in the City to the Contractor’s supervisor. Contractor, in turn, shall immediately notify the City of such conditions and shall take necessary precautions to safeguard passengers and personnel.

##### **8.1.2 In-Service Vehicle Failures**

The Contractor shall require the vehicle Operators to report any in-service vehicle failure to the Contractor’s supervisor. The supervisor will attempt to ascertain the problem, use good judgment, and instruct the vehicle Operator to take appropriate corrective action. If necessary, the supervisor will immediately send a spare vehicle to the location and the Operator and passengers will change vehicles and continue in service. The Contractor, if necessary, shall send a mechanic to the location in order to take corrective measures and/or supervise the towing of the vehicle.

##### **8.1.3 Wheelchair Lift/Ramp Failure**

The Contractor shall be responsible for the proper operation and maintenance of all wheelchair lifts or ramps. The Contractor shall require vehicle Operators to report all in-service lift or ramp failures to the Contractor’s supervisor. Wheelchair lifts and ramps shall be inspected daily as part of pre-trip inspections. If the lift or ramp fails while attempting to board a wheelchair passenger, the supervisor shall promptly arrange for alternate transportation for the passenger in the wheelchair inconvenienced by the equipment failure. If the lift or ramp fails while attempting discharge of a wheelchair passenger, the Operator shall manually operate the equipment and notify the supervisor. The supervisor shall arrange a vehicle change as quickly as reasonably possible following any lift or ramp failure.

**8.1.4 Passenger Disturbances**

The Contractor shall instruct vehicle Operators to report nonpayment of fares; graffiti or other vandalism on the vehicles; pushing, shoving and other disturbing or dangerous conduct; and other serious passenger disturbances to the vehicle Operator's supervisor. The supervisor shall use good judgment in handling passenger disturbances which occur on the bus or at the bus stop by appraising the situation, issuing appropriate instructions to the Operator and requesting law enforcement assistance if necessary.

**8.1.5 Medical Assistance to Passengers**

The Contractor's employees shall use good judgment in responding to passenger accidents, injuries, or illnesses occurring on the vehicles. In the event of a passenger requiring medical assistance, the vehicle Operator shall immediately advise the Contractor's supervisor of the situation and location of the vehicle and the supervisor shall notify the appropriate fire department, police department, or paramedics for assistance.

**8.1.6 Accidents**

The City requires the Contractor to have an accident and emergency notification program that keeps the City notified of accidents or emergencies and the progress of claims to assure City that claims are promptly and fairly handled. The Contractor shall require all vehicle Operators to report any accident or incident involving the vehicle to the Contractor's supervisor. The supervisor shall use good judgment in handling the situation, and shall immediately notify Sheriff or Fire department if necessary or if passengers were onboard at the time. The Contractor will complete an accident report approved by City with a copy sent to the City no later than the start of the next service day. The Contractor shall submit all accident-related reports to the DMV as required. Contractor must assume all liability for accidents and workers' compensation claims, etc.

**8.1.7 Emergencies and Natural Disasters**

In the event of an emergency or natural disaster, Contractor shall make available, to the maximum extent possible, transportation and communications services and facilities to assist the City in ameliorating such incidents. To the extent the City requires Contractor to provide such emergency services and facilities, Contractor shall be relieved of the obligation to fulfill the duties and responsibilities to operate services herein above contained. Further, Contractor shall be entitled to be paid reasonable compensation for providing such emergency services and facilities, provided however, that the amount of such compensation and time of its payment shall be mutually agreed upon by Contractor and the City following the conclusion of the emergency or disaster, or at such other time as they may mutually agree.

**9. Performance Standard and Fines:**

The Contractor will strive at all times to provide service in a manner which will ensure responsive service to transit customers, while at the same time maximizing service reliability and safety. In order to identify key areas of concern to the City, various performance standards are described below for which fines may be assessed when service falls below the standards. The City may elect to change, modify or add performance measures during the term of the contract to ensure a high level of customer service.

**9.1 Fixed Route Minimum Performance Standards:**

<b>Service Operation</b>	Vehicles shall be operated with primary regard for the safety, comfort, convenience, and overall satisfaction of passengers and the general public.
<b>Service Schedule</b>	Service shall be provided as scheduled or according to any adjusted schedule established by the City, including route modifications required as a result of construction, special events, or declared emergency
<b>On-Time Performance</b>	A vehicle will be noted as “on-time” if it leaves a stop no sooner than one minute before the scheduled time and no later than five (5) minutes after the scheduled departure time. <ul style="list-style-type: none"> <li>• 85% of departures must be made “on-time.” If at more than 15% of scheduled departures do not occur within five minutes after the scheduled departure time, On-Time Performance will be considered insufficient and subject to notice.</li> <li>• There will be zero tolerance for vehicles running more than one minute ahead of schedule (“hot”).</li> <li>• There will be zero tolerance for On-Time Performance violations on the first trip of any route.</li> </ul>
<b>Missed Trips</b>	Operational difficulties that result in missed or delayed trips or vehicles not operating as required by the Agreement must be reported immediately to the City. <ul style="list-style-type: none"> <li>• 90% of cumulative distance (in miles) will be met per single trip; when more than 10% of a trip distance (in miles) is not completed, it will be considered a missed trip unless otherwise approved by the City.</li> <li>• All timepoints will be met per single trip; unless otherwise approved by the City.</li> </ul>
<b>Communication Between City and Contractor</b>	City and Contractor shall develop agreed upon communication protocol detailing how information is conveyed and will establish time periods for different events. These procedures are intended to ensure that City Staff is aware of passenger concerns, complaints, and operational problems. Vehicle operators are to report passenger complaints or operational problems immediately to Contractor staff who will ensure that appropriate measures are taken to correct the problem.

## 9.2 Fines:

Any breach of this Agreement by Contractor could result in substantial damages and injury to the public and City in amounts which are difficult to ascertain with specificity at this time. Therefore, certain dollar amounts are established here for the identified standards. Fines may be waived if due to a manufacturer defect existing in a vehicle or series of vehicles.

The fines described below may be instituted by the City no sooner than two months after the initiation of the service, with the exception of the On-Time Performance Failure described below.

The City's may elect to not assess a penalty at any occurrence; however, this does not prohibit the City from assessing a penalty in the future for a similar occurrence. In addition, the fines detailed in this section shall not relieve Contractor of its obligations to satisfy each and every requirement under the terms of the Agreement.

The invalidity or unenforceability of any particular assessment established in this Section shall not affect the validity or enforceability of other assessments established in this Agreement.

The City's Transit Manager (or other city representative as determined by the Public Works Director) and Contractor's General Manager will meet per a mutually agreed upon schedule to review potential deficiencies. At the close of each of these meetings, a determination will be made as to what, if any, fines will be assessed. The Transit Manager's decision with regard to the assessment of payment reductions is final and may not be appealed. After fines are assessed, the rate of consideration shall revert to the rates specified in the Compensation section of the Agreement until the next assessment is made.

This Program does not lessen City's right to declare a material breach of contract for non-compliance reasons, nor does it constitute a waiver of any other remedies provided by law. This program is in addition to, and not in lieu of, all other City remedies for failure to perform the Agreement.

	<b>Item</b>	<b>1<sup>st</sup> Offense</b>	<b>2<sup>nd</sup> Offense</b>	<b>3<sup>rd</sup> or More</b>
1	On-Time Performance (per Section 9.1): Failing to maintain 85% on-time performance by leaving at a timepoint earlier than one minute or later than 10 minutes and/or failure to complete 90% of the miles of a route.	Warning	\$25 per On-Time Performance Violation	\$50 per On-Time Performance Violation
2	Reporting (per Section 7): Failing to submit reports and/or data when requested.	Warning	\$500 per report	\$1,000 per report
3	Vehicle Systems (per Section 4)	Warning	\$250 per incident, per vehicle, per day until completed	\$500 per incident, per vehicle, per day until completed
4	Vehicle Condition (per Section 8)	Warning	\$25 per incident, per vehicle, per day until completed	\$50 per incident, per vehicle, per day until completed
5	Body Damage (per Section 9)	Warning	\$250 per incident, per day until completed	\$500 per incident, per day until completed
6	Pre-Trip Inspection (Per Sections 6 and 8)	Warning	\$100 per inspection not completed	\$500 per inspection not completed
7	Operator Uniforms (Per Section 6)	Warning	\$25 per incident	\$50 per incident
8	Supervision Responsibilities (Per Section – All Section)	Warning	\$100 per incident	\$200 per incident
9	Safety and Emergency Procedures (Per Section 8)	Warning	\$500 per incident	\$1,000 per incident

ATTACHMENT B: MODEL PSA – FOR REFERENCE ONLY

## PROFESSIONAL SERVICES AGREEMENT

### **CONTRACT SUMMARY**

<b>Name of Contractor:</b>	
<b>City Department in charge of Contract:</b>	
<b>Contact Person for City Department:</b>	
<b>Period of Performance for Contract:</b>	
<b>Not to Exceed Amount of Contract:</b>	
<b>Scope of Work for Contract:</b>	

### **Insurance Requirements for Contract:**

yes  no - Is General Liability insurance required in this contract?

If yes, please provide coverage amounts:

yes  no - Is Auto insurance required in this contract?

If yes, please provide coverage amounts:

yes  no - Is Professional insurance required in this contract?

If yes, please provide coverage amounts:

**California requires Worker's Compensation insurance. If the vendor has no employees, a Worker's Compensation Affidavit is required.**

Other:

**Proper documentation is required and must be attached.**

**PROFESSIONAL SERVICES AGREEMENT  
Providing for Payment of Prevailing Wages**

(City of Calabasas/ *Company or Individual*)

**1. IDENTIFICATION**

THIS PROFESSIONAL SERVICES AGREEMENT (“Agreement”) is entered into by and between the City of Calabasas, a California municipal corporation (“City”), and \_\_\_\_\_ [*enter consultant (company's) name*] a \_\_\_\_\_ [*insert consultant's state of incorporation*], \_\_\_\_\_ [*enter consultant's legal status e.g., corporation, nonprofit public benefit corporation, limited liability company*] (“Consultant”).

**2. RECITALS**

- 2.1 City has determined that it requires the following professional services from a consultant: \_\_\_\_\_ [*insert description of consultant's services*].
- 2.2 Consultant represents that it is fully qualified to perform such professional services by virtue of its experience and the training, education and expertise of its principals and employees. Consultant further represents that it is willing to accept responsibility for performing such services in accordance with the terms and conditions set forth in this Agreement.

**NOW, THEREFORE**, for and in consideration of the mutual covenants and conditions herein contained, City and Consultant agree as follows:

**3. DEFINITIONS**

- 3.1 “Scope of Services”: Such professional services as are set forth in Consultant’s \_\_\_\_\_ [*enter consultant's proposal date*] proposal to City attached hereto as Exhibit A and incorporated herein by this reference.
- 3.2 “Approved Fee Schedule”: Such compensation rates as are set forth in Consultant’s \_\_\_\_\_ [*insert date fee schedule submitted to City*] fee schedule to City attached hereto as Exhibit B and incorporated herein by this reference.
- 3.3 “Commencement Date”: \_\_\_\_\_.
- 3.4 “Expiration Date”: \_\_\_\_\_.

#### 4. TERM

The term of this Agreement shall commence at 12:00 a.m. on the Commencement Date and shall expire at 11:59 p.m. on the Expiration Date unless extended by written agreement of the parties or terminated earlier in accordance with Section 17 (“Termination”) below.

#### 5. CONSULTANT'S SERVICES

- 5.1 Consultant shall perform the services identified in the Scope of Services. City shall have the right to request, in writing, changes in the Scope of Services. Any such changes mutually agreed upon by the parties, and any corresponding increase or decrease in compensation, shall be incorporated by written amendment to this Agreement. In no event shall the total compensation and costs payable to Consultant under this Agreement exceed the sum of \_\_\_\_\_ Dollars (\$\_\_\_\_\_.\_\_\_\_\_) unless specifically approved in advance and in writing by City.
- 5.2 Consultant shall perform all work to the highest professional standards of Consultant's profession and in a manner reasonably satisfactory to City. Consultant shall comply with all applicable federal, state and local laws and regulations, including the conflict of interest provisions of Government Code Section 1090 and the Political Reform Act (Government Code Section 81000 *et seq.*).
- 5.3 During the term of this Agreement, Consultant shall not perform any work for another person or entity for whom Consultant was not working at the Commencement Date if both (i) such work would require Consultant to abstain from a decision under this Agreement pursuant to a conflict of interest statute and (ii) City has not consented in writing to Consultant's performance of such work.
- 5.4 Consultant represents that it has, or will secure at its own expense, all personnel required to perform the services identified in the Scope of Services. All such services shall be performed by Consultant or under its supervision, and all personnel engaged in the work shall be qualified to perform such services. \_\_\_\_\_ [*Enter name of Consultant's Staff*] shall be Consultant's project administrator and shall have direct responsibility for management of Consultant's performance under this Agreement. No change shall be made in Consultant's project administrator without City's prior written consent.
- 5.5 To the extent that the Scope of Services involves trenches deeper than 4', Contractor shall promptly, and before the following conditions are disturbed, notify the City, in writing, of any:
  - (1) Material that the contractor believes may be material that is hazardous waste, as defined in § 25117 of the Health and Safety Code, which is required to be removed to a Class I, Class II, or Class III disposal site in accordance with provisions of existing law.
  - (2) Subsurface or latent physical conditions at the site differing from those indicated by information about the site made available to bidders prior to the deadline for submitting bids.

(3) Unknown physical conditions at the site of any unusual nature, different materially from those ordinarily encountered and generally recognized as inherent in work of the character provided for in the contract.

City shall promptly investigate the conditions, and if it finds that the conditions do materially so differ, or involve hazardous waste, and cause a decrease or increase in the contractor's cost of, or the time required for, performance of any part of the work, the City shall issue a change order under the procedures described in the contract.

## **6. COMPENSATION**

- 6.1 City agrees to compensate Consultant for the services provided under this Agreement, and Consultant agrees to accept in full satisfaction for such services, payment in accordance with the Approved Fee Schedule.
- 6.2 Consultant shall submit to City an invoice, on a monthly basis or less frequently, for the services performed pursuant to this Agreement. Each invoice shall itemize the services rendered during the billing period and the amount due. Within thirty calendar days of receipt of each invoice, City shall pay all undisputed amounts included on the invoice. City shall not withhold applicable taxes or other authorized deductions from payments made to Consultant.
- 6.3 Payments for any services requested by City and not included in the Scope of Services shall be made to Consultant by City on a time-and-materials basis using Consultant's standard fee schedule. Consultant shall be entitled to increase the fees in this fee schedule at such time as it increases its fees for its clients generally; provided, however, in no event shall Consultant be entitled to increase fees for services rendered before the thirtieth day after Consultant notifies City in writing of an increase in that fee schedule. Fees for such additional services shall be paid within sixty days of the date Consultant issues an invoice to City for such services.
- 6.4 This Agreement is further subject to the provisions of Article 1.7 (commencing at Section 20104.50) of Division 2, Part 3 of the Public Contract Code regarding prompt payment of contractors by local governments. Article 1.7 mandates certain procedures for the payment of undisputed and properly submitted payment requests within 30 days after receipt, for the review of payment requests, for notice to the contractor of improper payment requests, and provides for the payment of interest on progress payment requests which are not timely made in accordance with this Article. This Agreement hereby incorporates the provisions of Article 1.7 as though fully set forth herein.
- 6.5 To the extent applicable, at any time during the term of the Agreement, the Consultant may at its own expense, substitute securities equivalent to the amount withheld as retention (or the retained percentage) in accordance with Public Contract Code section 22300. At the request and expense of the consultant, securities equivalent to the amount withheld shall be deposited with the public agency, or with a state or federally chartered bank in this state as the escrow agent,

who shall then pay those moneys to the Consultant. Upon satisfactory completion of the contract, the securities shall be returned to the Consultant.

## **7. OWNERSHIP OF WRITTEN PRODUCTS**

All reports, documents or other written material (“written products” herein) developed by Consultant in the performance of this Agreement shall be and remain the property of City without restriction or limitation upon its use or dissemination by City. Consultant may take and retain copies of such written products as desired, but no such written products shall be the subject of a copyright application by Consultant.

## **8. RELATIONSHIP OF PARTIES**

Consultant is, and shall at all times remain as to City, a wholly independent contractor. Consultant shall have no power to incur any debt, obligation, or liability on behalf of City or otherwise to act on behalf of City as an agent. Neither City nor any of its agents shall have control over the conduct of Consultant or any of Consultant’s employees, except as set forth in this Agreement. Consultant shall not represent that it is, or that any of its agents or employees are, in any manner employees of City.

## **9. CONFIDENTIALITY**

All data, documents, discussion, or other information developed or received by Consultant or provided for performance of this Agreement are deemed confidential and shall not be disclosed by Consultant without prior written consent by City. City shall grant such consent if disclosure is legally required. Upon request, all City data shall be returned to City upon the termination or expiration of this Agreement.

## **10. INDEMNIFICATION**

- 10.1 The parties agree that City, its officers, agents, employees and volunteers should, to the fullest extent permitted by law, be protected from any and all loss, injury, damage, claim, lawsuit, cost, expense, attorneys’ fees, litigation costs, or any other cost arising out of or in any way related to the performance of this Agreement. Accordingly, the provisions of this indemnity provision are intended by the parties to be interpreted and construed to provide the City with the fullest protection possible under the law. Consultant acknowledges that City would not enter into this Agreement in the absence of Consultant’s commitment to indemnify and protect City as set forth herein.
- 10.2 To the fullest extent permitted by law, Consultant shall indemnify, hold harmless and defend City, its officers, agents, employees and volunteers from and against any and all claims and losses, costs or expenses for any damage due to death or injury to any person and injury to any property resulting from any alleged intentional, reckless, negligent, or otherwise wrongful acts, errors or omissions of Consultant or any of its officers, employees, servants, agents, or subcontractors in the performance of this Agreement. Such costs and expenses shall include reasonable attorneys’ fees due to counsel of City’s choice.
- 10.3 City shall have the right to offset against the amount of any compensation due Consultant under this Agreement any amount due City from Consultant as a result of Consultant’s

failure to pay City promptly any indemnification arising under this Section 10 and related to Consultant's failure to either (i) pay taxes on amounts received pursuant to this Agreement or (ii) comply with applicable workers' compensation laws.

- 10.4 The obligations of Consultant under this Section 10 will not be limited by the provisions of any workers' compensation act or similar act. Consultant expressly waives its statutory immunity under such statutes or laws as to City, its officers, agents, employees and volunteers.
- 10.5 Consultant agrees to obtain executed indemnity agreements with provisions identical to those set forth here in this Section 10 from each and every subcontractor or any other person or entity involved by, for, with or on behalf of Consultant in the performance of this Agreement. In the event Consultant fails to obtain such indemnity obligations from others as required herein, Consultant agrees to be fully responsible and indemnify, hold harmless and defend City, its officers, agents, employees and volunteers from and against any and all claims and losses, costs or expenses for any damage due to death or injury to any person and injury to any property resulting from any alleged intentional, reckless, negligent, or otherwise wrongful acts, errors or omissions of Consultant's subcontractors or any other person or entity involved by, for, with or on behalf of Consultant in the performance of this Agreement. Such costs and expenses shall include reasonable attorneys' fees incurred by counsel of City's choice.
- 10.6 City does not, and shall not, waive any rights that it may possess against Consultant because of the acceptance by City, or the deposit with City, of any insurance policy or certificate required pursuant to this Agreement. This hold harmless and indemnification provision shall apply regardless of whether or not any insurance policies are determined to be applicable to the claim, demand, damage, liability, loss, cost or expense.

## **11. INSURANCE**

- 11.1 During the term of this Agreement, Consultant shall carry, maintain, and keep in full force and effect insurance against claims for death or injuries to persons or damages to property that may arise from or in connection with Consultant's performance of this Agreement. Such insurance shall be of the types and in the amounts as set forth below:
  - 11.1.1 Comprehensive General Liability Insurance with coverage limits of not less than One Million Dollars (\$1,000,000) including products and operations hazard, contractual insurance, broad form property damage, independent consultants, personal injury, underground hazard, and explosion and collapse hazard where applicable.
  - 11.1.2 Automobile Liability Insurance for vehicles used in connection with the performance of this Agreement with minimum limits of One Million Dollars (\$1,000,000) per claimant and One Million dollars (\$1,000,000) per incident.
  - 11.1.3 Pollution Liability Insurance

- 11.1.4 Worker's Compensation insurance as required by the laws of the State of California, including but not limited to California Labor Code § 1860 and 1861 as follows:

Contractor shall take out and maintain, during the life of this contract, Worker's Compensation Insurance for all of Contractor's employees employed at the site of improvement; and, if any work is sublet, Contractor shall require the subcontractor similarly to provide Worker's Compensation Insurance for all of the latter's employees, unless such employees are covered by the protection afforded by Contractor. Contractor and any of Contractor's subcontractors shall be required to provide City with a written statement acknowledging its obligation to secure payment of Worker's Compensation Insurance as required by Labor Code § 1861; to wit: 'I am aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.' If any class of employees engaged in work under this contract at the site of the Project is not protected under any Worker's Compensation law, Contractor shall provide and shall cause each subcontractor to provide adequate insurance for the protection of employees not otherwise protected. Contractor shall indemnify and hold harmless City for any damage resulting from failure of either Contractor or any subcontractor to take out or maintain such insurance.

- 11.2 Consultant shall require each of its subcontractors to maintain insurance coverage that meets all of the requirements of this Agreement.
- 11.3 The policy or policies required by this Agreement shall be issued by an insurer admitted in the State of California and with a rating of at least A:VII in the latest edition of Best's Insurance Guide.
- 11.4 Consultant agrees that if it does not keep the aforesaid insurance in full force and effect, City may either (i) immediately terminate this Agreement; or (ii) take out the necessary insurance and pay, at Consultant's expense, the premium thereon.
- 11.5 At all times during the term of this Agreement, Consultant shall maintain on file with City's Risk Manager a certificate or certificates of insurance showing that the aforesaid policies are in effect in the required amounts and naming the City and its officers, employees, agents and volunteers as additional insureds. Consultant shall, prior to commencement of work under this Agreement, file with City's Risk Manager such certificate(s).
- 11.6 Consultant shall provide proof that policies of insurance required herein expiring during the term of this Agreement have been renewed or replaced with other policies providing at least the same coverage. Such proof will be furnished at least two weeks prior to the expiration of the coverages.
- 11.7 The General Liability Policy of insurance required by this Agreement shall contain an

endorsement naming City and its officers, employees, agents and volunteers as additional insureds. The General Liability Policy required under this Agreement shall contain an endorsement providing that the policies cannot be canceled or reduced except on thirty days' prior written notice to City. Consultant agrees to require its insurer to modify the certificates of insurance 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. If this contract provides service to a Homeowners Association, that Homeowners Association must be listed as an additional insured in addition to the City.

- 11.8 The insurance provided by Consultant shall be primary to any coverage available to City. Any insurance or self-insurance maintained by City and/or its officers, employees, agents or volunteers, shall be in excess of Consultant's insurance and shall not contribute with it.
- 11.9 All insurance coverage provided pursuant to this Agreement shall not prohibit Consultant, and Consultant's employees, agents or subcontractors, from waiving the right of subrogation prior to a loss. Consultant hereby waives all rights of subrogation against the City.
- 11.10 Any deductibles or self-insured retentions must be declared to and approved by the City. At the option of City, Consultant shall either reduce or eliminate the deductibles or self-insured retentions with respect to City, or Consultant shall procure a bond or other security acceptable to the City guaranteeing payment of losses and expenses.
- 11.11 Procurement of insurance by Consultant shall not be construed as a limitation of Consultant's liability or as full performance of Consultant's duties to indemnify, hold harmless and defend under Section 10 of this Agreement.

## **12. MUTUAL COOPERATION**

- 12.1 City shall provide Consultant with all pertinent data, documents and other requested information as is reasonably available for the proper performance of Consultant's services under this Agreement.
- 12.2 In the event any claim or action is brought against City relating to Consultant's performance in connection with this Agreement, Consultant shall render any reasonable assistance that City may require.

## **13. RECORDS AND INSPECTIONS**

Consultant shall maintain full and accurate records with respect to all matters covered under this Agreement for a period of three years after the expiration or termination of this Agreement. City shall have the right to access and examine such records, without charge, during normal business hours. City shall further have the right to audit such records, to make transcripts therefrom and to inspect all program data, documents, proceedings, and activities with respect to this Agreement.

## **14. PERMITS AND APPROVALS**

Consultant shall obtain, at its sole cost and expense, all permits and regulatory approvals necessary in the performance of this Agreement. This includes, but shall not be limited to, encroachment permits and building and safety permits and inspections.

## **15. NOTICES**

Any notices, bills, invoices, or reports required by this Agreement shall be deemed received on: (i) the day of delivery if delivered by hand, facsimile or overnight courier service during the addressee's regular business hours; or (ii) on the third business day following deposit in the United States mail if delivered by mail, postage prepaid, to the addresses listed below (or to such other addresses as the parties may, from time to time, designate in writing).

If to City:

City of Calabasas  
100 Civic Center Way  
Calabasas, CA 91302  
Attn: **[City Project Coordinator]**  
Telephone: (818) 224-1600  
Facsimile: (818) 225-XXXX

If to Consultant:

*Name of Consultant*  
*Street Address or P.O. Box*  
*City, State Zip Code*  
Attn: **[Consultant]**  
Telephone: ( ) \_\_\_\_-\_\_\_\_  
Email:

With courtesy copy to:

Matthew T. Summers  
Colantuono, Highsmith & Whatley, PC  
City Attorney  
790 E. Colorado Blvd., Suite 850  
Pasadena, CA 91101  
Telephone: (213) 542-5700  
Facsimile: (213) 542-5710

## **16. SURVIVING COVENANTS**

The parties agree that the covenants contained in Section 9, Section 10, Paragraph 12.2 and Section 13 of this Agreement shall survive the expiration or termination of this Agreement.

## **17. TERMINATION**

- 17.1. City shall have the right to terminate this Agreement for any reason on five calendar days' written notice to Consultant. Consultant shall have the right to terminate this Agreement for any reason on sixty calendar days' written notice to City. Consultant agrees to cease all work under this Agreement on or before the effective date of any notice of termination. All City data, documents, objects, materials or other tangible things shall be returned to City upon the termination or expiration of this Agreement.
- 17.2. If City terminates this Agreement due to no fault or failure of performance by Consultant, then Consultant shall be paid based on the work satisfactorily performed at the time of

termination. In no event shall Consultant be entitled to receive more than the amount that would be paid to Consultant for the full performance of the services required by this Agreement.

## **18. GENERAL PROVISIONS**

- 18.1. Consultant shall not delegate, transfer, subcontract or assign its duties or rights hereunder, either in whole or in part, without City's prior written consent, and any attempt to do so shall be void and of no effect. City shall not be obligated or liable under this Agreement to any party other than Consultant.
- 18.2. In the performance of this Agreement, Consultant shall not discriminate against any employee, subcontractor, or applicant for employment because of race, color, creed, religion, sex, marital status, sexual orientation, national origin, ancestry, age, physical or mental disability, medical condition or any other unlawful basis.
- 18.3. The captions appearing at the commencement of the sections hereof, and in any paragraph thereof, are descriptive only and for convenience in reference to this Agreement. Should there be any conflict between such heading, and the section or paragraph thereof at the head of which it appears, the section or paragraph thereof, as the case may be, and not such heading, shall control and govern in the construction of this Agreement. Masculine or feminine pronouns shall be substituted for the neuter form and vice versa, and the plural shall be substituted for the singular form and vice versa, in any place or places herein in which the context requires such substitution(s).
- 18.4. The waiver by City or Consultant of any breach of any term, covenant or condition herein contained shall not be deemed to be a waiver of such term, covenant or condition or of any subsequent breach of the same or any other term, covenant or condition herein contained. No term, covenant or condition of this Agreement shall be deemed to have been waived by City or Consultant unless in writing.
- 18.5. Consultant shall not be liable for any failure to perform if Consultant presents acceptable evidence, in City's sole judgment that such failure was due to causes beyond the control and without the fault or negligence of Consultant.

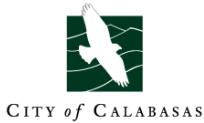
- 18.6. Each right, power and remedy provided for herein or now or hereafter existing at law, in equity, by statute, or otherwise shall be cumulative and shall be in addition to every other right, power, or remedy provided for herein or now or hereafter existing at law, in equity, by statute, or otherwise. The exercise, the commencement of the exercise, or the forbearance of the exercise by any party of any one or more of such rights, powers or remedies shall not preclude the simultaneous or later exercise by such party of any of all of such other rights, powers or remedies. In the event legal action shall be necessary to enforce any term, covenant or condition herein contained, the party prevailing in such action, whether reduced to judgment or not, shall be entitled to its reasonable and actual court costs, including accountants' fees, if any, and attorneys' fees expended in such action. The venue for any litigation shall be Los Angeles County, California.
- 18.7. If any term or provision of this Agreement or the application thereof to any person or circumstance shall, to any extent, be invalid or unenforceable, then such term or provision shall be amended to, and solely to, the extent necessary to cure such invalidity or unenforceability, and shall be enforceable in its amended form. In such event, the remainder of this Agreement, or the application of such term or provision to persons or circumstances other than those as to which it is held invalid or unenforceable, shall not be affected thereby, and each term and provision of this Agreement shall be valid and be enforced to the fullest extent permitted by law.
- 18.8. This Agreement shall be governed and construed in accordance with the laws of the State of California.
- 18.9. All documents referenced as exhibits in this Agreement are hereby incorporated into this Agreement. In the event of any material discrepancy between the express provisions of this Agreement and the provisions of any document incorporated herein by reference, the provisions of this Agreement shall prevail. This instrument contains the entire Agreement between City and Consultant with respect to the transactions contemplated herein. No other prior oral or written agreements are binding upon the parties. Amendments hereto or deviations herefrom shall be effective and binding only if made in writing and executed by City and Consultant.
- 18.10. This Agreement is further subject to the provisions of Article 1.5 (commencing at Section 20104) of Division 2, Part 3 of the Public Contract Code regarding the resolution of public works claims of less than \$375,000. Article 1.5 mandates certain procedures for the filing of claims and supporting documentation by the contractor, for the response to such claims by the contracting public agency, for a mandatory meet and confer conference upon the request of the contractor, for mandatory nonbinding mediation in the event litigation is commenced, and for mandatory judicial arbitration upon the failure to resolve the dispute through mediation. This Agreement hereby incorporates the provisions of Article 1.5 as though fully set forth herein.
- 18.11. This Agreement is further subject to the provisions of California Public Contracts Code § 6109 which prohibits the Consultant from performing work on this project

with a subcontractor who is ineligible to perform work on the project pursuant to §§ 1777.1 or 1777.7 of the Labor Code.

## **19. PREVAILING WAGES**

- 19.1 To the extent that the estimated amount of this Agreement exceeds \$1,000, this Agreement is subject to prevailing wage law, including, but not limited to, the following:
- 19.1.1 The Consultant shall pay the prevailing wage rates for all work performed under the Agreement. When any craft or classification is omitted from the general prevailing wage determinations, the Consultant shall pay the wage rate of the craft or classification most closely related to the omitted classification. The Consultant shall forfeit as a penalty to City \$50.00 or any greater penalty provided in the Labor Code for each calendar day, or portion thereof, for each worker paid less than the prevailing wage rates for any work done under the Agreement employed in the execution of the work by Consultant or by any subcontractor of Consultant in violation of the provisions of the Labor Code. In addition, the difference between such prevailing wage rates and the amount paid to each worker for each calendar day, or portion thereof, for which each worker was paid less than the prevailing wage rate shall be paid to each worker by the Consultant.
- 19.1.2 Consultant shall comply with the provisions of Labor Code Section 1777.5 concerning the employment of apprentices on public works projects, and further agrees that Consultant is responsible for compliance with Section 1777.5 by all of its subcontractors.
- 19.1.3 Pursuant to Labor Code § 1776, Consultant and any subcontractor shall keep accurate payroll records, showing the name, address, social security number, work classification, straight time and overtime hours worked each day and week, and the actual per diem wages paid to each journeyman, apprentice, worker, or other employee employed by Consultant in connection with this Agreement. Each payroll record shall contain or be verified by a written declaration that it is made under penalty of perjury, stating both of the following: (1) The information contained in the payroll record is true and correct; and (2) The employer has complied with the requirements of Labor Code §§ 1811, and 1815 for any work performed by his or her employees on the public works project. The payroll records enumerated under subdivision (a) shall be certified and shall be available for inspection at all reasonable hours as required by Labor Code § 1776.
- 19.1.4 Notwithstanding anything to the contrary, Consultant shall defend, indemnify, and hold harmless the City, and its officers, employees, agents, and volunteers free and harmless from any claim or liability arising out of failure or alleged failure of Consultant to comply with such prevailing wage laws.”

- 19.2 To the extent that the estimated amount of this Agreement exceeds \$1,000, this Agreement is further subject to 8-hour work day and wage and hour penalty law, including, but not limited to, Labor Code Sections 1810 and 1813, as well as California nondiscrimination laws, as follows:
- 19.2.1 Consultant shall strictly adhere to the provisions of the Labor Code regarding the 8-hour day and the 40-hour week, overtime, Saturday, Sunday and holiday work and nondiscrimination on the basis of race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, marital status, sex or sexual orientation, except as provided in Section 12940 of the Government Code. Pursuant to the provisions of the Labor Code, eight hours' labor shall constitute a legal day's work. Work performed by Consultant's employees in excess of eight hours per day, and 40 hours during any one week, must include compensation for all hours worked in excess of eight hours per day, or 40 hours during any one week, at not less than one and one-half times the basic rate of pay. Consultant shall forfeit as a penalty to City \$25.00 or any greater penalty set forth in the Labor Code for each worker employed in the execution of the work by Consultant or by any Subcontractor of Consultant, for each calendar day during which such worker is required or permitted to the work more than eight hours in one calendar day or more than 40 hours in any one calendar week in violation of the provisions of the Labor Code.



*Request for Proposal  
Public Transportation Services*

**TO EFFECTUATE THIS AGREEMENT**, the parties have caused their duly authorized representatives to execute this Agreement on the dates set forth below.

**“City”  
City of Calabasas**

By: \_\_\_\_\_  
*Name, Title*

Date: \_\_\_\_\_

By: \_\_\_\_\_  
*Name, Title*

Date: \_\_\_\_\_

By: \_\_\_\_\_  
*Name, Title*

Attest:

By: \_\_\_\_\_  
Maricela Hernandez, MMC, CPMC  
City Clerk

Date: \_\_\_\_\_

Approved as to form:

By: \_\_\_\_\_  
Matthew T. Summers  
Colantuono, Highsmith & Whatley, PC  
City Attorney

Date: \_\_\_\_\_

**“Consultant”  
Name of Company or Individual**

By: \_\_\_\_\_  
*Name, Level of Officer e.g., Vice President*

Date: \_\_\_\_\_

By: \_\_\_\_\_  
*Co-Authorized Signer, Level of Officer*

Date: \_\_\_\_\_

**EXHIBIT A**  
**SCOPE OF WORK**

**EXHIBIT B**  
**FEE SCHEDULE**

## **NON-COLLUSION AFFIDAVIT**

State of California      )  
                              ) ss.  
County of Los Angeles)

\_\_\_\_\_, being first duly sworn, deposes and says that he or she is \_\_\_\_\_ of \_\_\_\_\_, the party making the foregoing bid, that the bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid."

---

Signature of Bidder

---

Business Address

---

Place of Residence

Subscribed and sworn to before me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

Notary Public in and for the County  
of  
State of California.

My Commission Expires \_\_\_\_\_, 20\_\_.

## **WORKERS' COMPENSATION INSURANCE** **CERTIFICATE**

The Contractor shall execute the following form as required by the California Labor Code, Sections 1860 and 1861:

I am aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

DATE: \_\_\_\_\_

(Contractor)

By:

(Signature)

(Title)

Attest:

By:

(Signature)

(Title)

ATTACHMENT C: STATEMENT OF ECONOMIC INTEREST – FORM 700

# 2023-2024 Statement of Economic Interests



## Form 700

A Public Document

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### **Helpful Resources**

- Video Tutorials
- Reference Pamphlet
- Excel Version
- FAQs
- Gift and Travel Fact Sheet for State and Local Officials

**California Fair Political Practices Commission**

1102 Q Street, Suite 3050 • Sacramento, CA 95811

Email Advice: [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)

Toll-free advice line: 1 (866) ASK-FPPC • 1 (866) 275-3772

Telephone: (916) 322-5660 • Website: [www.fppc.ca.gov](http://www.fppc.ca.gov)

## Quick Start Guide

Detailed instructions begin on page 3.

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### WHEN IS THE ANNUAL STATEMENT DUE?

- March 1 – Elected State Officers, Judges and Court Commissioners, State Board and Commission members listed in Government Code Section 87200
- April 2 – Most other filers

### WHERE DO I FILE?

Most people file the Form 700 with their agency. If you're not sure where to file your Form 700, contact your filing officer or the person who asked you to complete it.

### ITEMS TO NOTE!

- The Form 700 is a public document.
- Only filers serving in active military duty may receive an extension on the filing deadline.
- You must also report interests held by your spouse or registered domestic partner.
- Your agency's conflict of interest code will help you to complete the Form 700. You are encouraged to get your conflict of interest code from the person who asked you to complete the Form 700.

### NOTHING TO REPORT?

Mark the "No reportable interests" box on Part 4 of the Cover Page, and submit only the signed Cover Page. Please review each schedule carefully!

Schedule	Common Reportable Interests	Common Non-Reportable Interests
A-1: Investments	Stocks, including those held in an IRA or 401K. Each stock must be listed.	Insurance policies, government bonds, diversified mutual funds, funds similar to diversified mutual funds.
A-2: Business Entities/Trusts	Business entities, sole proprietorships, partnerships, LLCs, corporations and trusts. (e.g., Form 1099 filers).	Savings and checking accounts, cryptocurrency, and annuities.
B: Real Property	Rental property in filer's jurisdiction, or within two miles of the boundaries of the jurisdiction.	A residence used exclusively as a personal residence (such as a home or vacation property).
C: Income	Non-governmental salaries. Note that filers are required to report only half of their spouse's or partner's salary.	Governmental salary (from school district, for example).
D: Gifts	Gifts from businesses, vendors, or other contractors (meals, tickets, etc.).	Gifts from family members.
E: Travel Payments	Travel payments from third parties (not your employer).	Travel paid by your government agency.

**Note:** Like reportable interests, non-reportable interests may also create conflicts of interest and could be grounds for disqualification from certain decisions.

### QUESTIONS?

- [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)
- (866) 275-3772 Mon-Thurs, 9-11:30 a.m.

### E-FILING ISSUES?

- If using your agency's system, please contact technical support at your agency.
- If using FPPC's e-filing system, write to [form700@fppc.ca.gov](mailto:form700@fppc.ca.gov).

## **What's New**

### **Gift Limit Increase**

The gift limit increased to **\$590** for calendar years **2023** and **2024**. The gift limit was \$520 for calendar years 2021 and 2022.

### **Who must file:**

- Elected and appointed officials and candidates listed in Government Code Section 87200
- Employees, appointed officials, and consultants filing pursuant to a conflict of interest code ("code filers"). **Obtain your disclosure categories, which describe the interests you must report, from your agency;** they are not part of the Form 700
- Candidates running for local elective offices that are designated in a conflict of interest code (e.g., county sheriffs, city clerks, school board trustees, and water board members)

#### **Exception:**

- Candidates for a county central committee are not required to file the Form 700
- Employees in newly created positions of existing agencies

For more information, see Reference Pamphlet, page 3, at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### **Where to file:**

#### **87200 Filers**

State offices	⦿ Your agency
Judicial offices	⦿ The clerk of your court
Retired Judges	⦿ Directly with FPPC
County offices	⦿ Your county filing official
City offices	⦿ Your city clerk
Multi-County offices	⦿ Your agency

#### **Code Filers — State and Local Officials, Employees, and Consultants Designated in a Conflict of Interest**

**Code:** File with your agency, board, or commission unless otherwise specified in your agency's code (e.g., Legislative staff files directly with FPPC). In most cases, the agency, board, or commission will retain the statements.

**Members of Newly Created Boards and Commissions:** File with your agency or with your agency's code reviewing body pursuant to Regulation 18754.

**Employees in Newly Created Positions of Existing Agencies:** File with your agency or with your agency's code reviewing body. (See Reference Pamphlet, page 3.)

#### **Candidates file as follow:**

State offices, Judicial offices and multi-county offices	⦿ County elections official with whom you file your declaration of candidacy
County offices	⦿ County elections official
City offices	⦿ City Clerk
Public Employee's Retirement System (CalPERS)	⦿ CalPERS
State Teacher's Retirement Board (CalSTRS)	⦿ CalSTRS

### **How to file:**

The Form 700 is available at [www.fppc.ca.gov](http://www.fppc.ca.gov). Form 700 schedules are also available in Excel format. Each Statement must have a handwritten "wet" signature or "secure electronic signature," meaning either (1) a signature submitted using an approved electronic filing system or (2) if permitted by the filing officer, a digital signature submitted via the filer's agency email address. (See Regulations 18104 and 18757.) Companies such as Adobe and DocuSign offer digital signature services. All statements are signed under the penalty of perjury and must be verified by the filer. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

### **When to file:**

#### **Annual Statements**

##### **⌚ March 1, 2024**

- Elected State Officers
- Judges and Court Commissioners
- State Board and State Commission Members listed in Government Code Section 87200

##### **⌚ April 2, 2024**

- Most other filers

Individuals filing under conflict of interest codes in city and county jurisdictions should verify the annual filing date with their filing official or filing officer.

Statements postmarked by the filing deadline are considered filed on time.

Statements of 30 pages or less may be emailed or faxed by the deadline as long as the originally signed paper version is sent by first class mail to the filing official within 24 hours.

#### **Assuming Office and Leaving Office Statements**

Most filers file within 30 days of assuming or leaving office or within 30 days of the effective date of a newly adopted or amended conflict of interest code.

#### **Exception:**

If you assumed office between October 1, 2023, and December 31, 2023, and filed an assuming office statement, you are not required to file an annual statement until March 1, 2025, or April 1, 2025, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2024. (See Reference Pamphlet, page 6, for additional exceptions.)

#### **Candidate Statements**

File no later than the final filing date for the declaration of candidacy or nomination documents. A candidate statement is not required if you filed an assuming office or annual statement for the same jurisdiction within 60 days before filing a declaration of candidacy or other nomination documents.

#### **Late Statements**

**There is no provision for filing deadline extensions unless the filer is serving in active military duty. (See page 19 for information on penalties and fines.)**

#### **Amendments**

Statements may be amended at any time. You are only required to amend the schedule that needs to be revised. It is not necessary to amend the entire filed form. The amended schedule(s) is attached to your original filed statement. Obtain amendment schedules at [www.fppc.ca.gov](http://www.fppc.ca.gov).

## Types of Statements

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### Assuming Office Statement:

If you are a newly appointed official or are newly employed in a position designated, or that will be designated, in a state or local agency's conflict of interest code, your assuming office date is the date you were sworn in or otherwise authorized to serve in the position. If you are a newly elected official, your assuming office date is the date you were sworn in.

- Report: Investments, interests in real property, and business positions held on the date you assumed the office or position must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date you assumed the office or position.

For positions subject to confirmation by the State Senate or the Commission on Judicial Appointments, your assuming office date is the date you were appointed or nominated to the position.

- Example: Maria Lopez was nominated by the Governor to serve on a state agency board that is subject to state Senate confirmation. The assuming office date is the date Maria's nomination is submitted to the Senate. Maria must report investments, interests in real property, and business positions Maria holds on that date, and income (including loans, gifts, and travel payments) received during the 12 months prior to that date.

If your office or position has been added to a newly adopted or newly amended conflict of interest code, use the effective date of the code or amendment, whichever is applicable.

- Report: Investments, interests in real property, and business positions held on the effective date of the code or amendment must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the effective date of the code or amendment.

### Annual Statement:

Generally, the period covered is January 1, 2023, through December 31, 2023. If the period covered by the statement is different than January 1, 2023, through December 31, 2023, (for example, you assumed office between October 1, 2022, and December 31, 2022 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2023.

- If your disclosure category changes during a reporting period, disclose under the old category until the effective date of the conflict of interest code amendment and disclose under the new disclosure category through the end of the reporting period.

### Leaving Office Statement:

Generally, the period covered is January 1, 2023, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2023, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2022, and December 31, 2022, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2023.

### Candidate Statement:

If you are filing a statement in connection with your candidacy for state or local office, investments, interests in real property, and business positions held on the date of filing your declaration of candidacy must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date of filing your declaration of candidacy is reportable. Do not change the preprinted dates on Schedules A-1, A-2, and B.

Candidates running for local elective offices (e.g., county sheriffs, city clerks, school board trustees, or water district board members) must file candidate statements, as required by the conflict of interest code for the elected position. The code may be obtained from the agency of the elected position.

### Amendments:

If you discover errors or omissions on any statement, file an amendment as soon as possible. You are only required to amend the schedule that needs to be revised; it is not necessary to refile the entire form. Obtain amendment schedules from the FPPC website at [www.fppc.ca.gov](http://www.fppc.ca.gov).

**Note:** Once you file your statement, you may not withdraw it. All changes must be noted on amendment schedules.

### Expanded Statement:

If you hold multiple positions subject to reporting requirements, you may be able to file an expanded statement for each position, rather than a separate and distinct statement for each position. The expanded statement must cover all reportable interests for all jurisdictions and list all positions on the Form 700 or on an attachment for which it is filed. The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1.

**STATEMENT OF ECONOMIC INTERESTS  
COVER PAGE  
A PUBLIC DOCUMENT**

Date Initial Filing Received  
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST)	(FIRST)	(MIDDLE)
----------------------	---------	----------

**1. Office, Agency, or Court**

Agency Name (*Do not use acronyms*)

Division, Board, Department, District, if applicable

Your Position

► If filing for multiple positions, list below or on an attachment. (*Do not use acronyms*)

Agency: \_\_\_\_\_ Position: \_\_\_\_\_

**2. Jurisdiction of Office (Check at least one box)**

State

Judge, Retired Judge, Pro Tem Judge, or Court Commissioner  
(Statewide Jurisdiction)

Multi-County \_\_\_\_\_

County of \_\_\_\_\_

City of \_\_\_\_\_

Other \_\_\_\_\_

**3. Type of Statement (Check at least one box)**

**Annual:** The period covered is January 1, 2023, through December 31, 2023.

**Leaving Office:** Date Left \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
(Check one circle.)

**-or-** The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_\_, through December 31, 2023.

The period covered is January 1, 2023, through the date of leaving office.

**Assuming Office:** Date assumed \_\_\_\_/\_\_\_\_/\_\_\_\_\_

The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_\_, through the date of leaving office.

**Candidate:** Date of Election \_\_\_\_\_ and office sought, if different than Part 1: \_\_\_\_\_

**4. Schedule Summary (required)**

► **Total number of pages including this cover page:** \_\_\_\_\_

**Schedules attached**

**Schedule A-1 - Investments** – schedule attached

**Schedule C - Income, Loans, & Business Positions** – schedule attached

**Schedule A-2 - Investments** – schedule attached

**Schedule D - Income - Gifts** – schedule attached

**Schedule B - Real Property** – schedule attached

**Schedule E - Income - Gifts - Travel Payments** – schedule attached

**-or- None - No reportable interests on any schedule**

**5. Verification**

MAILING ADDRESS (Business or Agency Address Recommended - Public Document)	STREET	CITY	STATE	ZIP CODE
---	--------	------	-------	----------

DAYTIME TELEPHONE NUMBER (      )	EMAIL ADDRESS
--------------------------------------	---------------

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed \_\_\_\_\_  
(month, day, year)

Signature \_\_\_\_\_  
(File the originally signed paper statement with your filing official.)

## Instructions Cover Page

Enter your name, mailing address, and daytime telephone number in the spaces provided. **Because the Form 700 is a public document, you may list your business/office address instead of your home address.**

### Part 1. Office, Agency, or Court

- Enter the name of the office sought or held, or the agency or court. Consultants must enter the public agency name rather than their private firm's name. (Examples: State Assembly; Board of Supervisors; Office of the Mayor; Department of Finance; Hope County Superior Court).
- Indicate the name of your division, board, or district, if applicable. (Examples: Division of Waste Management; Board of Accountancy; District 45). **Do not use acronyms.**
- Enter your position title. (Examples: Director; Chief Counsel; City Council Member; Staff Services Analyst).
- If you hold multiple positions (i.e., a city council member who also is a member of a county board or commission) you may be required to file separate and distinct statements with each agency. To simplify your filing obligations, in some cases you may instead complete a single expanded statement and file it with each agency.
  - The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1. To file an expanded statement for multiple positions, enter the name of each agency with which you are required to file and your position title with each agency in the space provided. **Do not use acronyms.** Attach an additional sheet if necessary. Complete one statement disclosing all reportable interests for all jurisdictions. Then file the expanded statement with each agency as directed by Regulation 18723.1(c).

If you assume or leave a position after a filing deadline, you must complete a separate statement. For example, a city council member who assumes a position with a county special district after the April annual filing deadline must file a separate assuming office statement. In subsequent years, the city council member may expand their annual filing to include both positions.

#### Example:

Brian Bourne is a city council member for the City of Lincoln and a board member for the Camp Far West Irrigation District – a multi-county agency that covers the Counties of Placer and Yuba. The City is located within Placer County. Brian may complete one expanded statement to disclose all reportable interests for both offices and list both positions on the Cover Page. Brian will file the expanded statement with each the City and the District as directed by Regulation 18723.1(c).

### Part 2. Jurisdiction of Office

- Check the box indicating the jurisdiction of your agency and, if applicable, identify the jurisdiction. Judges, judicial candidates, and court commissioners have statewide jurisdiction. All other filers should review the Reference Pamphlet, page 13, to determine their jurisdiction.
- If your agency is a multi-county office, list each county in which your agency has jurisdiction.

- If your agency is not a state office, court, county office, city office, or multi-county office (e.g., school districts, special districts and JPAs), check the "other" box and enter the county or city in which the agency has jurisdiction.

#### Example:

This filer is a member of a water district board with jurisdiction in portions of Yuba and Sutter Counties.

1. Office, Agency, or Court	
Agency Name <small>(Do not use acronyms)</small>	
Feather River Irrigation District	
Division, Board, Department, District, if applicable	Your Position
N/A	Board Member
► If filing for multiple positions, list below or on an attachment. <small>(Do not use acronyms)</small>	
Agency: N/A	Position: _____
2. Jurisdiction of Office <small>(Check at least one box)</small>	
<input type="checkbox"/> State	<input type="checkbox"/> Judge or Court Commissioner (Statewide Jurisdiction)
<input checked="" type="checkbox"/> Multi-County Yuba & Sutter Counties	<input type="checkbox"/> County of _____
<input type="checkbox"/> City of _____	<input type="checkbox"/> Other _____

### Part 3. Type of Statement

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2023 annual statement, **do not** change the pre-printed dates to reflect 2024. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2024, through December 31, 2024, will be disclosed on your statement filed in 2025. See Reference Pamphlet, page 4.

**Combining Statements:** Certain types of statements for the same position may be combined. For example, if you leave office after January 1, but before the deadline for filing your annual statement, you may combine your annual and leaving office statements. File by the earliest deadline. Consult your filing officer or the FPPC.

### Part 4. Schedule Summary

- Complete the Schedule Summary after you have reviewed each schedule to determine if you have reportable interests.
- Enter the total number of completed pages including the cover page and either check the box for each schedule you use to disclose interests; **or** if you have nothing to disclose on any schedule, check the "No reportable interests" box. Please **do not** attach any blank schedules.

### Part 5. Verification

Complete the verification by signing the statement and entering the date signed. Each statement must have an original "wet" signature unless filed with a secure electronic signature. (See page 3 above.) All statements must be signed under penalty of perjury and be verified by the filer pursuant to Government Code Section 81004. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

**When you sign your statement, you are stating, under penalty of perjury, that it is true and correct.** Only the filer has authority to sign the statement. An unsigned statement is not considered filed and you may be subject to late filing penalties.

# SCHEDULE A-1

## Investments

### Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)

*Investments must be itemized.*

*Do not attach brokerage or financial statements.*

CALIFORNIA FORM **700**  
FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock	Other _____ (Describe)
Partnership	Income Received of \$0 - \$499 Income Received of \$500 or More ( <i>Report on Schedule C</i> )

IF APPLICABLE, LIST DATE:

\_\_\_\_ / \_\_\_\_ /23      \_\_\_\_ / \_\_\_\_ /23  
ACQUIRED                  DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock	Other _____ (Describe)
Partnership	Income Received of \$0 - \$499 Income Received of \$500 or More ( <i>Report on Schedule C</i> )

IF APPLICABLE, LIST DATE:

\_\_\_\_ / \_\_\_\_ /23      \_\_\_\_ / \_\_\_\_ /23  
ACQUIRED                  DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock	Other _____ (Describe)
Partnership	Income Received of \$0 - \$499 Income Received of \$500 or More ( <i>Report on Schedule C</i> )

IF APPLICABLE, LIST DATE:

\_\_\_\_ / \_\_\_\_ /23      \_\_\_\_ / \_\_\_\_ /23  
ACQUIRED                  DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock	Other _____ (Describe)
Partnership	Income Received of \$0 - \$499 Income Received of \$500 or More ( <i>Report on Schedule C</i> )

IF APPLICABLE, LIST DATE:

\_\_\_\_ / \_\_\_\_ /23      \_\_\_\_ / \_\_\_\_ /23  
ACQUIRED                  DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock	Other _____ (Describe)
Partnership	Income Received of \$0 - \$499 Income Received of \$500 or More ( <i>Report on Schedule C</i> )

IF APPLICABLE, LIST DATE:

\_\_\_\_ / \_\_\_\_ /23      \_\_\_\_ / \_\_\_\_ /23  
ACQUIRED                  DISPOSED

► NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock	Other _____ (Describe)
Partnership	Income Received of \$0 - \$499 Income Received of \$500 or More ( <i>Report on Schedule C</i> )

IF APPLICABLE, LIST DATE:

\_\_\_\_ / \_\_\_\_ /23      \_\_\_\_ / \_\_\_\_ /23  
ACQUIRED                  DISPOSED

Comments: \_\_\_\_\_

## Instructions – Schedules A-1 and A-2

### Investments

---

“Investment” means a financial interest in any business entity (including a consulting business or other independent contracting business) that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency’s jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more at any time during the reporting period. (See Reference Pamphlet, page 13.)

#### **Reportable investments include:**

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 13.)
- Sole proprietorships
- Your own business or your spouse’s or registered domestic partner’s business (See Reference Pamphlet, page 8, for the definition of “business entity.”)
- Your spouse’s or registered domestic partner’s investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 15.)
- If you, your spouse or registered domestic partner, and dependent children together had a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. (See Reference Pamphlet, page 16, for more information on disclosing trusts.)
- Business trusts

#### **You are not required to disclose:**

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. (See Reference Pamphlet, page 13.) (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Cryptocurrency
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)

#### **Reminders**

- Do you know your agency’s jurisdiction?
- Did you hold investments at any time during the period covered by this statement?
- Code filers – your disclosure categories may only require disclosure of specific investments.

- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 15.)
- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 16.)

**Use Schedule A-1** to report ownership of less than 10% (e.g., stock). Schedule C (Income) may also be required if the investment is not a stock or corporate bond. (See second example below.)

**Use Schedule A-2** to report ownership of 10% or greater (e.g., a sole proprietorship).

#### **To Complete Schedule A-1:**

Do not attach brokerage or financial statements.

- Disclose the name of the business entity. Do not use acronyms for the name of the business entity, unless it is one that is commonly understood by the public.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 20 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

#### **Examples:**

Frank Byrd holds a state agency position. Frank’s conflict of interest code requires full disclosure of investments. Frank must disclose stock holdings of \$2,000 or more in any company that is located in or does business in California, as well as those stocks held by Franks’s spouse or registered domestic partner and dependent children.

Alice Lance is a city council member. Alice has a 4% interest, worth \$5,000, in a limited partnership located in the city. Alice must disclose the partnership on Schedule A-1 and income of \$500 or more received from the partnership on Schedule C.

**SCHEDULE A-2**  
**Investments, Income, and Assets**  
**of Business Entities/Trusts**  
(Ownership Interest is 10% or Greater)

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

**► 1. BUSINESS ENTITY OR TRUST**

Name \_\_\_\_\_

Address (*Business Address Acceptable*) \_\_\_\_\_

*Check one*

Trust, go to 2

Business Entity, complete the box, then go to 2

**GENERAL DESCRIPTION OF THIS BUSINESS**

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE:

\$0 - \$1,999  
\$2,000 - \$10,000  
\$10,001 - \$100,000  
\$100,001 - \$1,000,000  
Over \$1,000,000

/ /23      / /23

ACQUIRED      DISPOSED

NATURE OF INVESTMENT

Partnership      Sole Proprietorship

Other \_\_\_\_\_

YOUR BUSINESS POSITION \_\_\_\_\_

**► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)**

\$0 - \$499      \$10,001 - \$100,000  
\$500 - \$1,000      OVER \$100,000  
\$1,001 - \$10,000

**► 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE** (Attach a separate sheet if necessary)

None      or      Names listed below

**► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST**

*Check one box:*

INVESTMENT      REAL PROPERTY

Name of Business Entity, if Investment, or  
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or  
City or Other Precise Location of Real Property

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000  
\$10,001 - \$100,000  
\$100,001 - \$1,000,000  
Over \$1,000,000

/ /23      / /23

ACQUIRED      DISPOSED

NATURE OF INTEREST

Property Ownership/Deed of Trust      Stock      Partnership

Leasehold      \_\_\_\_\_  
Yrs. remaining

Other      \_\_\_\_\_

Check box if additional schedules reporting investments or real property  
are attached

**► 1. BUSINESS ENTITY OR TRUST**

Name \_\_\_\_\_

Address (*Business Address Acceptable*) \_\_\_\_\_

*Check one*

Trust, go to 2

Business Entity, complete the box, then go to 2

**GENERAL DESCRIPTION OF THIS BUSINESS**

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE:

\$0 - \$1,999  
\$2,000 - \$10,000  
\$10,001 - \$100,000  
\$100,001 - \$1,000,000  
Over \$1,000,000

/ /23      / /23

ACQUIRED      DISPOSED

NATURE OF INVESTMENT

Partnership      Sole Proprietorship

Other \_\_\_\_\_

YOUR BUSINESS POSITION \_\_\_\_\_

**► 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)**

\$0 - \$499      \$10,001 - \$100,000  
\$500 - \$1,000      OVER \$100,000  
\$1,001 - \$10,000

**► 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE** (Attach a separate sheet if necessary)

None      or      Names listed below

**► 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST**

*Check one box:*

INVESTMENT      REAL PROPERTY

Name of Business Entity, if Investment, or  
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or  
City or Other Precise Location of Real Property

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000  
\$10,001 - \$100,000  
\$100,001 - \$1,000,000  
Over \$1,000,000

/ /23      / /23

ACQUIRED      DISPOSED

NATURE OF INTEREST

Property Ownership/Deed of Trust      Stock      Partnership

Leasehold      \_\_\_\_\_  
Yrs. remaining

Other      \_\_\_\_\_

Check box if additional schedules reporting investments or real property  
are attached

**Comments:** \_\_\_\_\_

## Instructions – Schedule A-2

### Investments, Income, and Assets of Business Entities/Trusts

---

Use Schedule A-2 to report investments in a business entity (including a consulting business or other independent contracting business) or trust (including a living trust) in which you, your spouse or registered domestic partner, and your dependent children, together or separately, had a 10% or greater interest, totaling \$2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction. Do not report a trust that contains non-reportable interests. For example, a trust containing only your personal residence not used in whole or in part as a business, your savings account, and some municipal bonds, is not reportable.

Also report on Schedule A-2 investments and real property held by that entity or trust if your pro rata share of the investment or real property interest was \$2,000 or more during the reporting period.

#### To Complete Schedule A-2:

**Part 1.** Disclose the name and address of the business entity or trust. If you are reporting an interest in a business entity, check “Business Entity” and complete the box as follows:

- Provide a general description of the business activity of the entity.
- Check the box indicating the highest fair market value of your investment during the reporting period.
- If you initially acquired or entirely disposed of this interest during the reporting period, enter the date acquired or disposed.
- Identify the nature of your investment.
- Disclose the job title or business position you held with the entity, if any (i.e., if you were a director, officer, partner, trustee, employee, or held any position of management). A business position held by your spouse is not reportable.

**Part 2.** Check the box indicating **your pro rata** share of the **gross** income received **by** the business entity or trust. This amount includes your pro rata share of the **gross** income **from** the business entity or trust, as well as your community property interest in your spouse's or registered domestic partner's share. Gross income is the total amount of income before deducting expenses, losses, or taxes.

**Part 3.** Disclose the name of each source of income that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency's jurisdiction, as follows:

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was \$10,000 or more during the reporting period. (See Reference Pamphlet, page 11, for examples.) Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.
- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in Part 1. (See Reference Pamphlet, page 8.)

You may be required to disclose sources of income located outside your jurisdiction. For example, you may have a client who resides outside your jurisdiction who does business on a regular basis with you. Such a client, if a reportable source of \$10,000 or more, must be disclosed.

Mark “None” if you do not have any reportable \$10,000 sources of income to disclose. Phrases such as “various clients” or “not disclosing sources pursuant to attorney-client privilege” are not adequate disclosure. (See Reference Pamphlet, page 14, for information on procedures to request an exemption from disclosing privileged information.)

**Part 4.** Report any investments or interests in real property held or leased **by the entity or trust** identified in Part 1 if your pro rata share of the interest held was \$2,000 or more during the reporting period. Attach additional schedules or use FPPC's Form 700 Excel spreadsheet if needed.

- Check the applicable box identifying the interest held as real property or an investment.
- If investment, provide the name and description of the business entity.
- If real property, report the precise location (e.g., an assessor's parcel number or address).
- Check the box indicating the highest fair market value of your interest in the real property or investment during the reporting period. (Report the fair market value of the portion of your residence claimed as a tax deduction if you are utilizing your residence for business purposes.)
- Identify the nature of your interest.
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property or investment during the reporting period.

Name \_\_\_\_\_

**SCHEDULE B**  
**Interests in Real Property**  
(Including Rental Income)

► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY \_\_\_\_\_

FAIR MARKET VALUE  
 \$2,000 - \$10,000  
 \$10,001 - \$100,000  
 \$100,001 - \$1,000,000  
 Over \$1,000,000

IF APPLICABLE, LIST DATE:  
 \_\_\_\_ / \_\_\_\_ / **23**      \_\_\_\_ / \_\_\_\_ / **23**  
 ACQUIRED      DISPOSED

NATURE OF INTEREST

Ownership/Deed of Trust      Easement

Leasehold \_\_\_\_\_  
 Yrs. remaining \_\_\_\_\_      Other \_\_\_\_\_

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

\$0 - \$499	\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000	

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

None

► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY \_\_\_\_\_

FAIR MARKET VALUE  
 \$2,000 - \$10,000  
 \$10,001 - \$100,000  
 \$100,001 - \$1,000,000  
 Over \$1,000,000

IF APPLICABLE, LIST DATE:  
 \_\_\_\_ / \_\_\_\_ / **23**      \_\_\_\_ / \_\_\_\_ / **23**  
 ACQUIRED      DISPOSED

NATURE OF INTEREST

Ownership/Deed of Trust      Easement

Leasehold \_\_\_\_\_  
 Yrs. remaining \_\_\_\_\_      Other \_\_\_\_\_

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

\$0 - \$499	\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000	

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

None

\* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\*

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE      TERM (Months/Years)

\_\_\_\_\_ %      None      \_\_\_\_\_

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000

Guarantor, if applicable

NAME OF LENDER\*

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE      TERM (Months/Years)

\_\_\_\_\_ %      None      \_\_\_\_\_

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000

Guarantor, if applicable

Comments: \_\_\_\_\_

## Instructions – Schedule B

### Interests in Real Property

Report interests in real property located in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more any time during the reporting period. Real property is also considered to be "within the jurisdiction" of a local government agency if the property or any part of it is located within two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency. (See Reference Pamphlet, page 13.)

#### **Interests in real property include:**

- An ownership interest (including a beneficial ownership interest)
- A deed of trust, easement, or option to acquire property
- A leasehold interest (See Reference Pamphlet, page 14.)
- A mining lease
- An interest in real property held in a retirement account (See Reference Pamphlet, page 15.)
- An interest in real property held by a business entity or trust in which you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater ownership interest (Report on Schedule A-2.)
- Your spouse's or registered domestic partner's interests in real property that are legally held separately by him or her

#### **You are not required to report:**

- A residence, such as a home or vacation cabin, used exclusively as a personal residence (However, a residence in which you rent out a room or for which you claim a business deduction may be reportable. If reportable, report the fair market value of the portion claimed as a tax deduction.)
- Some interests in real property held through a blind trust (See Reference Pamphlet, page 16.)
  - **Please note:** A non-reportable property can still be grounds for a conflict of interest and may be disqualifying.

#### **To Complete Schedule B:**

- Report the precise location (e.g., an assessor's parcel number or address) of the real property.
- Check the box indicating the fair market value of your interest in the property (regardless of what you owe on the property).
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property during the reporting period.
- Identify the nature of your interest. If it is a leasehold,

#### **Reminders**

- Income and loans already reported on Schedule B are not also required to be reported on Schedule C.
- Real property already reported on Schedule A-2, Part 4 is not also required to be reported on Schedule B.
- Code filers – do your disclosure categories require disclosure of real property?

disclose the number of years remaining on the lease.

- If you received rental income, check the box indicating the gross amount you received.
- If you had a 10% or greater interest in real property and received rental income, list the name of the source(s) if your pro rata share of the gross income from any single tenant was \$10,000 or more during the reporting period. If you received a total of \$10,000 or more from two or more tenants acting in concert (in most cases, this will apply to married couples), disclose the first and last name of each tenant. Otherwise, mark "None."
- Loans from a private lender that total \$500 or more and are secured by real property may be reportable. **Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.**

When reporting a loan:

- Provide the name and address of the lender.
- Describe the lender's business activity.
- Disclose the interest rate and term of the loan. For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period. The term of a loan is the total number of months or years given for repayment of the loan at the time the loan was established.
- Check the box indicating the highest balance of the loan during the reporting period.
- Identify a guarantor, if applicable.

If you have more than one reportable loan on a single piece of real property, report the additional loan(s) on Schedule C.

#### **Example:**

Allison Gande is a city planning commissioner.

During the reporting period, Allison received rental income of \$12,000, from a single tenant who rented property owned in the city's jurisdiction. If Allison received \$6,000 each from two tenants, the tenants' names would not be required because no single tenant paid her \$10,000 or more. A married couple is considered a single tenant.

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 4600 24th Street		IF APPLICABLE, LIST DATE: / / XX      / / XX
CITY Sacramento		
FAIR MARKET VALUE <input type="checkbox"/> \$2,000 - \$4,999 <input type="checkbox"/> \$5,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000		
ACQUIRED      DISPOSED		
NATURE OF INTEREST <input type="checkbox"/> Ownership/Deed of Trust <input type="checkbox"/> Easement <input type="checkbox"/> Leasehold <input type="checkbox"/> Other Yrs. remaining		
IF RENTAL PROPERTY, GROSS INCOME RECEIVED <input type="checkbox"/> \$0 - \$499 <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000		
SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more. <input type="checkbox"/> None      Henry Wells		
NAME OF LENDER* Sophia Petroillo		
ADDRESS (Business Address Acceptable) 2121 Blue Sky Parkway, Sacramento		
BUSINESS ACTIVITY, IF ANY, OF LENDER Restaurant Owner		
INTEREST RATE      TERM (Months/Years) 8 % <input type="checkbox"/> None      15 Years		
HIGHEST BALANCE DURING REPORTING PERIOD <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000		
<input type="checkbox"/> Guarantor, if applicable		
Comments: _____		

**SCHEDULE C**  
**Income, Loans, & Business**  
**Positions**  
(Other than Gifts and Travel Payments)

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

► **1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

YOUR BUSINESS POSITION

GROSS INCOME RECEIVED

No Income - Business Position Only

\$500 - \$1,000

\$1,001 - \$10,000

\$10,001 - \$100,000

OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary      Spouse's or registered domestic partner's income  
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use  
Schedule A-2.)

Sale of \_\_\_\_\_  
(*Real property, car, boat, etc.*)

Loan repayment

Commission or      Rental Income, *list each source of \$10,000 or more*  
\_\_\_\_\_  
(*Describe*)

Other \_\_\_\_\_  
(*Describe*)

► **1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

YOUR BUSINESS POSITION

GROSS INCOME RECEIVED

No Income - Business Position Only

\$500 - \$1,000

\$1,001 - \$10,000

\$10,001 - \$100,000

OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary      Spouse's or registered domestic partner's income  
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use  
Schedule A-2.)

Sale of \_\_\_\_\_  
(*Real property, car, boat, etc.*)

Loan repayment

Commission or      Rental Income, *list each source of \$10,000 or more*  
\_\_\_\_\_  
(*Describe*)

Other \_\_\_\_\_  
(*Describe*)

► **2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD**

- \* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\*

INTEREST RATE

TERM (Months/Years)

\_\_\_\_\_ %      None

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF LENDER

SECURITY FOR LOAN

None      Personal residence

HIGHEST BALANCE DURING REPORTING PERIOD

Real Property \_\_\_\_\_  
*Street address*

\$500 - \$1,000

\_\_\_\_\_  
*City*

\$1,001 - \$10,000

Guarantor \_\_\_\_\_

\$10,001 - \$100,000

Other \_\_\_\_\_  
(*Describe*)

OVER \$100,000

Comments: \_\_\_\_\_

## Instructions – Schedule C

### Income, Loans, & Business Positions

#### (Income Other Than Gifts and Travel Payments)

##### **Reporting Income:**

Report the source and amount of gross income of \$500 or more you received during the reporting period. Gross income is the total amount of income before deducting expenses, losses, or taxes and includes loans other than loans from a commercial lending institution. (See Reference Pamphlet, page 11.) You must also report the source of income to your spouse or registered domestic partner if your community property share was \$500 or more during the reporting period.

The source and income must be reported only if the source is located in, doing business in, planning to do business in, or has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) Reportable sources of income may be further limited by your disclosure category located in your agency's conflict of interest code.

##### **Reporting Business Positions:**

You must report your job title with each reportable business entity even if you received no income during the reporting period. Use the comments section to indicate that no income was received.

##### **Commonly reportable income and loans include:**

- Salary/wages, per diem, and reimbursement for expenses including travel payments provided by your employer
- Community property interest (50%) in your spouse's or registered domestic partner's income - **report the employer's name and all other required information**
- Income from investment interests, such as partnerships, reported on Schedule A-1
- Commission income not required to be reported on Schedule A-2 (See Reference Pamphlet, page 8.)
- Gross income from any sale, including the sale of a house or car (Report your pro rata share of the total sale price.)
- Rental income not required to be reported on Schedule B
- Prizes or awards not disclosed as gifts
- Payments received on loans you made to others
- An honorarium received prior to becoming a public official (See Reference Pamphlet, page 10.)
- Incentive compensation (See Reference Pamphlet, page 12.)

##### **Reminders**

- Code filers – your disclosure categories may not require disclosure of all sources of income.
- If you or your spouse or registered domestic partner are self-employed, report the business entity on Schedule A-2.
- Do not disclose on Schedule C income, loans, or business positions already reported on Schedules A-2 or B.

##### **You are not required to report:**

- Salary, reimbursement for expenses or per diem, or social security, disability, or other similar benefit payments received by you or your spouse or registered domestic partner from a federal, state, or local government agency.
- Stock dividends and income from the sale of stock unless the source can be identified.
- Income from a PERS retirement account.

(See Reference Pamphlet, page 12.)

##### **To Complete Schedule C:**

###### **Part 1. Income Received/Business Position Disclosure**

- Disclose the name and address of each source of income or each business entity with which you held a business position.
- Provide a general description of the business activity if the source is a business entity.
- Check the box indicating the amount of gross income received.
- Identify the consideration for which the income was received.
- For income from commission sales, check the box indicating the gross income received and list the name of each source of commission income of \$10,000 or more. (See Reference Pamphlet, page 8.) **Note: If you receive commission income on a regular basis or have an ownership interest of 10% or more, you must disclose the business entity and the income on Schedule A-2.**
- Disclose the job title or business position, if any, that you held with the business entity, even if you did not receive income during the reporting period.

###### **Part 2. Loans Received or Outstanding During the Reporting Period**

- Provide the name and address of the lender.
- Provide a general description of the business activity if the lender is a business entity.
- Check the box indicating the highest balance of the loan during the reporting period.
- Disclose the interest rate and the term of the loan.
  - For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period.
  - The term of the loan is the total number of months or years given for repayment of the loan at the time the loan was entered into.
- Identify the security, if any, for the loan.

Name \_\_\_\_\_

**SCHEDULE D**  
**Income – Gifts**

► NAME OF SOURCE (*Not an Acronym*)

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
-----------------	-------	------------------------

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\$\_\_\_\_\_

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\$\_\_\_\_\_

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\$\_\_\_\_\_

► NAME OF SOURCE (*Not an Acronym*)

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
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\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\$\_\_\_\_\_

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► NAME OF SOURCE (*Not an Acronym*)

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
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► NAME OF SOURCE (*Not an Acronym*)

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
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► NAME OF SOURCE (*Not an Acronym*)

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
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► NAME OF SOURCE (*Not an Acronym*)

ADDRESS (*Business Address Acceptable*)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
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\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\$\_\_\_\_\_

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**Comments:** \_\_\_\_\_

## Instructions – Schedule D

### Income – Gifts

A gift is anything of value for which you have not provided equal or greater consideration to the donor. A gift is reportable if its fair market value is \$50 or more. In addition, multiple gifts totaling \$50 or more received during the reporting period from a single source must be reported.

It is the acceptance of a gift, not the ultimate use to which it is put, that imposes your reporting obligation. Except as noted below, you must report a gift even if you never used it or if you gave it away to another person.

If the exact amount of a gift is unknown, you must make a good faith estimate of the item's fair market value. Listing the value of a gift as "over \$50" or "value unknown" is not adequate disclosure. In addition, if you received a gift through an intermediary, you must disclose the name, address, and business activity of both the donor and the intermediary. You may indicate an intermediary either in the "source" field after the name or in the "comments" section at the bottom of Schedule D.

#### **Commonly reportable gifts include:**

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- Parking passes not used for official agency business
- Food, beverages, and accommodations, including those provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering
- Rebates/discounts not made in the regular course of business to members of the public without regard to official status
- Wedding gifts (See Reference Pamphlet, page 16)
- An honorarium received prior to assuming office (You may report an honorarium as income on Schedule C, rather than as a gift on Schedule D, if you provided services of equal or greater value than the payment received. See Reference Pamphlet, page 10.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

#### **Reminders**

- Gifts from a single source are subject to a \$590 limit in 2023. (See Reference Pamphlet, page 10.)
- Code filers – you only need to report gifts from reportable sources.

#### **Gift Tracking Mobile Application**

- FPPC has created a gift tracking app for mobile devices that helps filers track gifts and provides a quick and easy way to upload the information to the Form 700. Visit FPPC's website to download the app.

#### **You are not required to disclose:**

- Gifts that were not used and that, within 30 days after receipt, were returned to the donor or delivered to a charitable organization or government agency without being claimed by you as a charitable contribution for tax purposes
- Gifts from your spouse or registered domestic partner, child, parent, grandparent, grandchild, brother, sister, and certain other family members (See Regulation 18942 for a complete list.). The exception does not apply if the donor was acting as an agent or intermediary for a reportable source who was the true donor.
- Gifts of similar value exchanged between you and an individual, other than a lobbyist registered to lobby your state agency, on holidays, birthdays, or similar occasions
- Gifts of informational material provided to assist you in the performance of your official duties (e.g., books, pamphlets, reports, calendars, periodicals, or educational seminars)
- A monetary bequest or inheritance (However, inherited investments or real property may be reportable on other schedules.)
- Personalized plaques or trophies with an individual value of less than \$250
- Campaign contributions
- Up to two tickets, for your own use, to attend a fundraiser for a campaign committee or candidate, or to a fundraiser for an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. The ticket must be received from the organization or committee holding the fundraiser.
- Gifts given to members of your immediate family if the source has an established relationship with the family member and there is no evidence to suggest the donor had a purpose to influence you. (See Regulation 18943.)
- Free admission, food, and nominal items (such as a pen, pencil, mouse pad, note pad or similar item) available to all attendees, at the event at which the official makes a speech (as defined in Regulation 18950(b)(2)), so long as the admission is provided by the person who organizes the event.
- Any other payment not identified above, that would otherwise meet the definition of gift, where the payment is made by an individual who is not a lobbyist registered to lobby the official's state agency, where it is clear that the gift was made because of an existing personal or business relationship unrelated to the official's position and there is no evidence whatsoever at the time the gift is made to suggest the donor had a purpose to influence you.

#### **To Complete Schedule D:**

- Disclose the full name (not an acronym), address, and, if a business entity, the business activity of the source.
- Provide the date (month, day, and year) of receipt, and disclose the fair market value and description of the gift.

Name \_\_\_\_\_

**SCHEDULE E**  
**Income – Gifts**  
**Travel Payments, Advances,**  
**and Reimbursements**

- Mark either the gift or income box.
- Mark the “501(c)(3)” box for a travel payment received from a nonprofit 501(c)(3) organization or the “Speech” box if you made a speech or participated in a panel. Per Government Code Section 89506, these payments may not be subject to the gift limit. However, they may result in a disqualifying conflict of interest.
- For gifts of travel, provide the travel destination.

► NAME OF SOURCE (*Not an Acronym*)

ADDRESS (*Business Address Acceptable*)

CITY AND STATE

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ - \_\_\_\_ / \_\_\_\_ / \_\_\_\_ AMT: \$ \_\_\_\_\_  
(If gift)

► MUST CHECK ONE:      Gift    -or-    Income

Made a Speech/Participated in a Panel

Other - Provide Description \_\_\_\_\_

► If Gift, Provide Travel Destination \_\_\_\_\_

► NAME OF SOURCE (*Not an Acronym*)

ADDRESS (*Business Address Acceptable*)

CITY AND STATE

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ - \_\_\_\_ / \_\_\_\_ / \_\_\_\_ AMT: \$ \_\_\_\_\_  
(If gift)

► MUST CHECK ONE:      Gift    -or-    Income

Made a Speech/Participated in a Panel

Other - Provide Description \_\_\_\_\_

► If Gift, Provide Travel Destination \_\_\_\_\_

► NAME OF SOURCE (*Not an Acronym*)

ADDRESS (*Business Address Acceptable*)

CITY AND STATE

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ - \_\_\_\_ / \_\_\_\_ / \_\_\_\_ AMT: \$ \_\_\_\_\_  
(If gift)

► MUST CHECK ONE:      Gift    -or-    Income

Made a Speech/Participated in a Panel

Other - Provide Description \_\_\_\_\_

► If Gift, Provide Travel Destination \_\_\_\_\_

► NAME OF SOURCE (*Not an Acronym*)

ADDRESS (*Business Address Acceptable*)

CITY AND STATE

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ - \_\_\_\_ / \_\_\_\_ / \_\_\_\_ AMT: \$ \_\_\_\_\_  
(If gift)

► MUST CHECK ONE:      Gift    -or-    Income

Made a Speech/Participated in a Panel

Other - Provide Description \_\_\_\_\_

► If Gift, Provide Travel Destination \_\_\_\_\_

Comments: \_\_\_\_\_

## Instructions – Schedule E

### Travel Payments, Advances, and Reimbursements

Travel payments reportable on Schedule E include advances and reimbursements for travel and related expenses, including lodging and meals.

Gifts of travel may be subject to the gift limit. In addition, certain travel payments are reportable gifts, but are not subject to the gift limit. To avoid possible misinterpretation or the perception that you have received a gift in excess of the gift limit, you may wish to provide a specific description of the purpose of your travel. (See the FPPC fact sheet entitled "Limitations and Restrictions on Gifts, Honoraria, Travel, and Loans" to read about travel payments under section 89506(a).)

#### You are not required to disclose:

- Travel payments received from any state, local, or federal government agency for which you provided services equal or greater in value than the payments received, such as reimbursement for travel on agency business from your government agency employer.
- A payment for travel from another local, state, or federal government agency and related per diem expenses when the travel is for education, training or other inter-agency programs or purposes.
- Travel payments received from your employer in the normal course of your employment that are included in the income reported on Schedule C.
- A travel payment that was received from a nonprofit entity exempt from taxation under Internal Revenue Code Section 501(c)(3) for which you provided equal or greater consideration, such as reimbursement for travel on business for a 501(c)(3) organization for which you are a board member.

**Note: Certain travel payments may not be reportable if reported via email on Form 801 by your agency.**

#### To Complete Schedule E:

- Disclose the full name (not an acronym) and address of the source of the travel payment.
- Identify the business activity if the source is a business entity.
- Check the box to identify the payment as a gift or income, report the amount, and disclose the date(s).
  - Travel payments are gifts** if you did not provide services that were equal to or greater in value than the payments received. You must disclose gifts totaling \$50 or more from a single source during the period covered by the statement.

When reporting travel payments that are gifts, you must provide a description of the gift, the **date(s)** received, and the **travel destination**.

- Travel payments are income** if you provided services that were equal to or greater in value than the

payments received. You must disclose income totaling \$500 or more from a single source during the period covered by the statement. You have the burden of proving the payments are income rather than gifts. When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments that are income.

#### Example:

City council member MaryClaire Chandler is the chair of a 501(c)(6) trade association, and the association pays for MaryClaire's travel to attend its meetings. Because

MaryClaire is deemed to be providing equal or greater consideration for the travel payment by virtue of serving on the board, this payment may be reported as income. Payments for MaryClaire to attend other events for which they are not providing services are likely considered gifts.

Note that the same payment from a 501(c)(3) would NOT be reportable.

#### Example:

Mayor Kim travels to China on a trip organized by China Silicon Valley Business Development, a California nonprofit, 501(c)(6) organization. The Chengdu Municipal People's

► NAME OF SOURCE (Not an Acronym) Health Services Trade Association
ADDRESS (Business Address Acceptable) 1230 K Street, Suite 610 CITY AND STATE Sacramento, CA
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE Association of Healthcare Workers
DATE(S): <u>      </u> / <u>      </u> / <u>      </u> (if gift) AMT: \$ <u>550.00</u>
► MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input checked="" type="checkbox"/> Income
<input type="radio"/> Made a Speech/Participated in a Panel
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for board meeting.</u>
► If Gift, Provide Travel Destination _____

► NAME OF SOURCE (Not an Acronym) Chengdu Municipal People's Government
ADDRESS (Business Address Acceptable) 2 Caoshi St, CaoShiJie, Qingyang Qu, Chengdu Shi, Sichuan Sheng, China, 610000
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE
DATE(S): <u>09</u> / <u>04</u> / <u>XX</u> - <u>09</u> / <u>08</u> / <u>XX</u> AMT: \$ <u>3,874.38</u> (if gift)
► MUST CHECK ONE: <input checked="" type="checkbox"/> Gift -or- <input type="checkbox"/> Income
<input type="radio"/> Made a Speech/Participated in a Panel
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for trip to China.</u>
► If Gift, Provide Travel Destination <u>Sichuan Sheng, China</u>

Government pays for Mayor Kim's airfare and travel costs, as well as meals and lodging during the trip. The trip's agenda shows that the trip's purpose is to promote job creation and economic activity in China and in Silicon Valley, so the trip is reasonably related to a governmental purpose. Thus, Mayor Kim must report the gift of travel, but the gift is exempt from the gift limit. In this case, the travel payments are not subject to the gift limit because the source is a foreign government and because the travel is reasonably related to a governmental purpose. (Section 89506(a)(2).) Note that Mayor Kim could be disqualified from participating in or making decisions about The Chengdu Municipal People's Government for 12 months. Also note that if China Silicon Valley Business Development (a 501(c)(6) organization) paid for the travel costs rather than the governmental organization, the payments would be subject to the gift limits. (See the FPPC fact sheet, Limitations and Restrictions on Gifts, Honoraria, Travel and Loans, at [www.fppc.ca.gov](http://www.fppc.ca.gov).)

## Restrictions and Prohibitions

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The Political Reform Act (Gov. Code Sections 81000-91014) requires most state and local government officials and employees to publicly disclose their economic interests including personal assets and income. The Act's conflict of interest provisions also disqualify a public official from taking part in a governmental decision if it is reasonably foreseeable that the decision will have a material financial effect on these economic interests as well as the official's personal finances and those of immediate family. (Gov. Code Sections 87100 and 87103.) The Fair Political Practices Commission (FPPC) is the state agency responsible for issuing the attached Statement of Economic Interests, Form 700, and for interpreting the Act's provisions.

### **Gift Prohibition**

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2023-2024, the gift limit increased to \$590 from a single source during a calendar year.

Additionally, state officials, state candidates, and certain state employees are subject to a \$10 limit per calendar month on gifts from lobbyists and lobbying firms registered with the Secretary of State. See Reference Pamphlet, page 10.

State and local officials and employees should check with their agency to determine if other restrictions apply.

### **Disqualification**

Public officials are, under certain circumstances, required to disqualify themselves from making, participating in, or attempting to influence governmental decisions that will affect their economic interests. This may include interests they are not required to disclose. For example, a personal residence is often not reportable, but may be grounds for disqualification. Specific disqualification requirements apply to 87200 filers (e.g., city councilmembers, members of boards of supervisors, planning commissioners, etc.). These officials must publicly identify the economic interest that creates a conflict of interest and leave the room before a discussion or vote takes place at a public meeting. For more information, consult Government Code Section 87105, Regulation 18707, and the Guide to Recognizing Conflicts of Interest page at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### **Honorarium Ban**

Most state and local officials, employees, and candidates are prohibited from accepting an honorarium for any speech given, article published, or attendance at a conference, convention, meeting, or like gathering. (See Reference Pamphlet, page 10.)

### **Loan Restrictions**

Certain state and local officials are subject to restrictions on loans. (See Reference Pamphlet, page 14.)

### **Post-Governmental Employment**

There are restrictions on representing clients or employers before former agencies. The provisions apply to elected state officials, most state employees, local elected officials, county chief administrative officers, city managers, including the chief administrator of a city, and general managers or chief administrators of local special districts and JPAs. The FPPC website has fact sheets explaining the provisions.

### **Late Filing**

The filing officer who retains originally-signed or electronically filed statements of economic interests may impose on an individual a fine for any statement that is filed late. The fine is \$10 per day up to a maximum of \$100. Late filing penalties may be reduced or waived under certain circumstances.

Persons who fail to timely file their Form 700 may be referred to the FPPC's Enforcement Division (and, in some cases, to the Attorney General or district attorney) for investigation and possible prosecution. In addition to the late filing penalties, a fine of up to \$5,000 per violation may be imposed.

**For assistance** concerning reporting, prohibitions, and restrictions under the Act:

- Email questions to [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov).
- Call the FPPC toll-free at (866) 275-3772.

### **Form 700 is a Public Document Public Access Must Be Provided**

Statements of Economic Interests are public documents. The filing officer must permit any member of the public to inspect and receive a copy of any statement.

- Statements must be available as soon as possible during the agency's regular business hours, but in any event not later than the second business day after the statement is received. Access to the Form 700 is not subject to the Public Records Act procedures.
- No conditions may be placed on persons seeking access to the forms.
- No information or identification may be required from persons seeking access.
- Reproduction fees of no more than 10 cents per page may be charged.

## Questions and Answers

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### General

- Q. What is the reporting period for disclosing interests on an assuming office statement or a candidate statement?
- A. On an assuming office statement, disclose all reportable investments, interests in real property, and business positions held on the date you assumed office. In addition, you must disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you assumed office.

On a candidate statement, disclose all reportable investments, interests in real property, and business positions held on the date you file your declaration of candidacy. You must also disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you file your declaration of candidacy.

- Q. I hold two other board positions in addition to my position with the county. Must I file three statements of economic interests?
- A. Yes, three are required. However, you may instead complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Disclose all reportable economic interests in all three jurisdictions on the expanded statement. File the expanded statement for your primary position providing an original "wet" signature unless filed with a secure electronic signature. (See page 3 above.) File copies of the expanded statement with the other two agencies as required by Regulation 18723.1(c). Remember to complete separate statements for positions that you leave or assume during the year.

- Q. I am a department head who recently began acting as city manager. Should I file as the city manager?
- A. Yes. File an assuming office statement as city manager. Persons serving as "acting," "interim," or "alternate" must file as if they hold the position because they are or may be performing the duties of the position.

- Q. My spouse and I are currently separated and in the process of obtaining a divorce. Must I still report my spouse's income, investments, and interests in real property?
- A. Yes. A public official must continue to report a spouse's economic interests until such time as dissolution of marriage proceedings is final. However, if a separate property agreement has been reached prior to that time, your estranged spouse's income may not have to be reported. Contact the FPPC for more information.
- Q. As a designated employee, I left one state agency to work for another state agency. Must I file a leaving office statement?
- A. Yes. You may also need to file an assuming office statement for the new agency.

### Investment Disclosure

- Q. I have an investment interest in shares of stock in a company that does not have an office in my jurisdiction. Must I still disclose my investment interest in this company?
- A. Probably. The definition of "doing business in the jurisdiction" is not limited to whether the business has an office or physical location in your jurisdiction. (See Reference Pamphlet, page 13.)
- Q. My spouse and I have a living trust. The trust holds rental property in my jurisdiction, our primary residence, and investments in diversified mutual funds. I have full disclosure. How is this trust disclosed?
- A. Disclose the name of the trust, the rental property and its income on Schedule A-2. Your primary residence and investments in diversified mutual funds registered with the SEC are not reportable.
- Q. I am required to report all investments. I have an IRA that contains stocks through an account managed by a brokerage firm. Must I disclose these stocks even though they are held in an IRA and I did not decide which stocks to purchase?
- A. Yes. Disclose on Schedule A-1 or A-2 any stock worth \$2,000 or more in a business entity located in or doing business in your jurisdiction.

## Questions and Answers

### Continued

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- Q. The value of my stock changed during the reporting period. How do I report the value of the stock?
- A. You are required to report the highest value that the stock reached during the reporting period. You may use your monthly statements to determine the highest value. You may also use the entity's website to determine the highest value. You are encouraged to keep a record of where you found the reported value. Note that for an assuming office statement, you must report the value of the stock on the date you assumed office.
- Q. I am the sole owner of my business, an S-Corporation. I believe that the nature of the business is such that it cannot be said to have any "fair market value" because it has no assets. I operate the corporation under an agreement with a large insurance company. My contract does not have resale value because of its nature as a personal services contract. Must I report the fair market value for my business on Schedule A-2 of the Form 700?
- A. Yes. Even if there are no *tangible* assets, intangible assets, such as relationships with companies and clients are commonly sold to qualified professionals. The "fair market value" is often quantified for other purposes, such as marital dissolutions or estate planning. In addition, the IRS presumes that "personal services corporations" have a fair market value. A professional "book of business" and the associated goodwill that generates income are not without a determinable value. The Form 700 does not require a precise fair market value; it is only necessary to check a box indicating the broad range within which the value falls.
- Q. I own stock in IBM and must report this investment on Schedule A-1. I initially purchased this stock in the early 1990s; however, I am constantly buying and selling shares. Must I note these dates in the "Acquired" and "Disposed" fields?
- A. No. You must only report dates in the "Acquired" or "Disposed" fields when, during the reporting period, you initially purchase a reportable investment worth \$2,000 or more or when you dispose of the entire investment. You are not required to track the partial trading of an investment.
- Q. On last year's filing I reported stock in Encoe valued at \$2,000 - \$10,000. Late last year the value of this stock fell below and remains at less than \$2,000. How should this be reported on this year's statement?
- A. You are not required to report an investment if the value was less than \$2,000 during the **entire** reporting period. However, because a disposed date is not required for stocks that fall below \$2,000, you may want to report the stock and note in the "comments" section that the value fell below \$2,000. This would be for informational purposes only; it is not a requirement.
- Q. We have a Section 529 account set up to save money for our son's college education. Is this reportable?
- A. If the Section 529 account contains reportable interests (e.g., common stock valued at \$2,000 or more), those interests are reportable (not the actual Section 529 account). If the account contains solely mutual funds, then nothing is reported.

### **Income Disclosure**

- Q. I reported a business entity on Schedule A-2. Clients of my business are located in several states. Must I report all clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2, Part 3?
- A. No, only the clients located in or doing business on a regular basis in your jurisdiction must be disclosed.
- Q. I believe I am not required to disclose the names of clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2 because of their right to privacy. Is there an exception for reporting clients' names?
- A. Regulation 18740 provides a procedure for requesting an exemption to allow a client's name not to be disclosed if disclosure of the name would violate a legally recognized privilege under California or Federal law. This regulation may be obtained from our website at [www.fppc.ca.gov](http://www.fppc.ca.gov). (See Reference Pamphlet, page 14.)

## Questions and Answers

### Continued

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- Q.** I am sole owner of a private law practice that is not reportable based on my limited disclosure category. However, some of the sources of income to my law practice are from reportable sources. Do I have to disclose this income?
- A.** Yes, even though the law practice is not reportable, reportable sources of income to the law practice of \$10,000 or more must be disclosed. This information would be disclosed on Schedule C with a note in the "comments" section indicating that the business entity is not a reportable investment. The note would be for informational purposes only; it is not a requirement.
- Q.** I am the sole owner of my business. Where do I disclose my income - on Schedule A-2 or Schedule C?
- A.** Sources of income to a business in which you have an ownership interest of 10% or greater are disclosed on Schedule A-2. (See Reference Pamphlet, page 8.)
- Q.** My spouse is a partner in a four-person firm where all of their business is based on their own billings and collections from various clients. How do I report my community property interest in this business and the income generated in this manner?
- A.** If your spouse's investment in the firm is 10% or greater, disclose 100% of your spouse's share of the business on Schedule A-2, Part 1 and 50% of your spouse's income on Schedule A-2, Parts 2 and 3. For example, a client of your spouse's must be a source of at least \$20,000 during the reporting period before the client's name is reported.
- Q.** How do I disclose my spouse's or registered domestic partner's salary?
- A.** Report the name of the employer as a source of income on Schedule C.
- Q.** I am a doctor. For purposes of reporting \$10,000 sources of income on Schedule A-2, Part 3, are the patients or their insurance carriers considered sources of income?
- A.** If your patients exercise sufficient control by selecting you instead of other doctors, then your patients, rather than their insurance carriers, are sources of income to you. (See Reference Pamphlet, page 14.)
- Q.** I received a loan from my grandfather to purchase my home. Is this loan reportable?
- A.** No. Loans received from family members are not reportable.
- Q.** Many years ago, I loaned my parents several thousand dollars, which they paid back this year. Do I need to report this loan repayment on my Form 700?
- A.** No. Payments received on a loan made to a family member are not reportable.

### Real Property Disclosure

- Q.** During this reporting period we switched our principal place of residence into a rental. I have full disclosure and the property is located in my agency's jurisdiction, so it is now reportable. Because I have not reported this property before, do I need to show an "acquired" date?
- A.** No, you are not required to show an "acquired" date because you previously owned the property. However, you may want to note in the "comments" section that the property was not previously reported because it was used exclusively as your residence. This would be for informational purposes only; it is not a requirement.
- Q.** I am a city manager, and I own a rental property located in an adjacent city, but one mile from the city limit. Do I need to report this property interest?
- A.** Yes. You are required to report this property because it is located within 2 miles of the boundaries of the city you manage.
- Q.** Must I report a home that I own as a personal residence for my daughter?
- A.** You are not required to disclose a home used as a personal residence for a family member unless you receive income from it, such as rental income.
- Q.** I am a co-signer on a loan for a rental property owned by a friend. Since I am listed on the deed of trust, do I need to report my friend's property as an interest in real property on my Form 700?
- A.** No. Simply being a co-signer on a loan for property does not create a reportable interest in that real property.

## Questions and Answers

### Continued

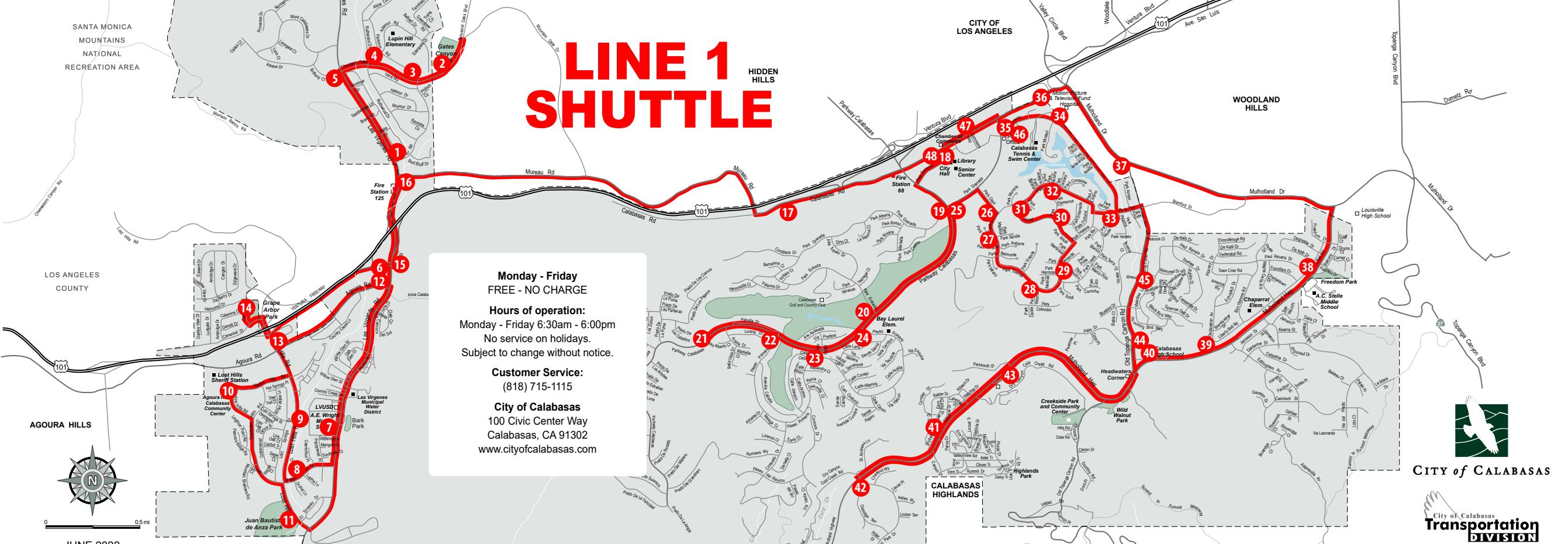
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#### **Gift Disclosure**

- Q. If I received a reportable gift of two tickets to a concert valued at \$100 each, but gave the tickets to a friend because I could not attend the concert, do I have any reporting obligations?
- A. Yes. Since you accepted the gift and exercised discretion and control of the use of the tickets, you must disclose the gift on Schedule D.
- Q. Julia and Jared Benson, a married couple, want to give a piece of artwork to a county supervisor. Is each spouse considered a separate source for purposes of the gift limit and disclosure?
- A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2023 the gift limit was \$590, so the Bensons may have given the supervisor artwork valued at no more than \$1,080. The supervisor must identify Jared and Julia Benson as the sources of the gift.
- Q. I am a Form 700 filer with full disclosure. Our agency holds a holiday raffle to raise funds for a local charity. I bought \$10 worth of raffle tickets and won a gift basket valued at \$120. The gift basket was donated by Doug Brewer, a citizen in our city. At the same event, I bought raffle tickets for, and won a quilt valued at \$70. The quilt was donated by a coworker. Are these reportable gifts?
- A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at \$110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was donated by an employee of your agency, it is not a reportable gift.

- Q. My agency is responsible for disbursing grants. An applicant (501(c)(3) organization) met with agency employees to present its application. At this meeting, the applicant provided food and beverages. Would the food and beverages be considered gifts to the employees? These employees are designated in our agency's conflict of interest code and the applicant is a reportable source of income under the code.
- A. Yes. If the value of the food and beverages consumed by any one filer, plus any other gifts received from the same source during the reporting period total \$50 or more, the food and beverages would be reported using the fair market value and would be subject to the gift limit.
- Q. I received free admission to an educational conference related to my official duties. Part of the conference fees included a round of golf. Is the value of the golf considered informational material?
- A. No. The value of personal benefits, such as golf, attendance at a concert, or sporting event, are gifts subject to reporting and limits.

ATTACHMENT D: TRANSIT ROUTES



JUNE 2022

STOP	LOCATION	TIME	TIME	TIME	TIME	TIME
1	Las Virgenes Road at Parkmor Road	6:30 AM	8:22 AM	10:12 AM	12:14 PM	2:06 PM
2	Thousand Oaks Boulevard at Gates Canyon Park	6:34 AM	8:26 AM	10:16 AM	12:18 PM	2:10 PM
3	Thousand Oaks Boulevard at Parkmor Road	6:35 AM	8:27 AM	10:17 AM	12:19 PM	2:11 PM
4	Thousand Oaks Boulevard at Ruthwood Drive	6:36 AM	8:28 AM	10:18 AM	12:20 PM	2:12 PM
5	Las Virgenes Road at Thousand Oaks Boulevard	6:38 AM	8:30 AM	10:20 AM	12:22 PM	2:14 PM
6	Las Virgenes Road at Shell Station	6:41 AM	8:33 AM	10:23 AM	12:25 PM	2:17 PM
7	Las Virgenes Road at A.E. Wright Middle School	6:44 AM	8:35 AM	10:36 AM	12:28 PM	2:20 PM
8	Meadow Creek Lane at Oleander Court	6:45 AM	8:36 AM	10:37 AM	12:29 PM	2:21 PM
9	Lost Hills Road at Cold Springs Street	6:46 AM	8:37 AM	10:38 AM	12:30 PM	2:22 PM
10	Malibu Hills Road at Agoura Hills/Calabasas Community Center	6:49 AM	8:40 AM	10:41 AM	12:33 PM	2:25 PM
11	Lost Hills Road at Juan Bautista de Anza Park	6:52 AM	8:43 AM	10:44 AM	12:36 PM	2:28 PM
12	Agoura Road at Las Virgenes Road (Metro)	6:57 AM	8:48 AM	10:49 AM	12:41 PM	2:33 PM
13	Agoura Road at Lost Hills Road (Metro - Summit)	6:59 AM	8:50 AM	10:51 AM	12:43 PM	2:35 PM
14	Parkville Rd. at Grape Arbor Park	7:01 AM	8:52 AM	10:53 AM	12:45 PM	2:37 PM
15	Las Virgenes Road at Southbound US 101	7:05 AM	8:56 AM	10:57 AM	12:49 PM	2:41 PM
16	Las Virgenes Road at Mureau Road	7:07 AM	8:58 AM	10:59 AM	12:51 PM	2:43 PM
17	Calabasas Road between BMW/Audi Dealerships	7:17 AM	9:05 AM	11:06 AM	12:58 PM	2:50 PM
18	Park Sorrento at Civic Center Way (City Hall)	7:16 AM	9:07 AM	11:08 AM	1:00 PM	2:52 PM
19	Parkway Calabasas at Park Granada	7:17 AM	9:08 AM	11:09 AM	1:01 PM	2:53 PM
20	Parkway Calabasas at Park Entrada	7:19 AM	9:10 AM	11:11 AM	1:03 PM	2:55 PM
21	Parkway Calabasas at the Oaks Gate	7:23 AM	9:14 AM	11:15 AM	1:07 PM	2:59 PM
22	Parkway Calabasas at Paseo Primario (South)	7:24 AM	9:15 AM	11:16 AM	1:08 PM	3:00 PM
23	Parkway Calabasas at Camino Portal	7:25 AM	9:16 AM	11:17 AM	1:09 PM	3:01 PM
24	Parkway Calabasas at Paseo Primario (North)	7:26 AM	9:17 AM	11:18 AM	1:10 PM	3:02 PM
						5:04 PM

STOP	LOCATION	TIME	TIME	TIME	TIME	TIME
25	Park Granada at Parkway Calabasas	7:29 AM	9:20 AM	11:21 AM	1:13 PM	3:05 PM
26	Park Sienna at Park Capri	7:30 AM	9:21 AM	11:22 AM	1:14 PM	3:06 PM
27	Park Sienna at Park Antigua	7:31 AM	9:22 AM	11:23 AM	1:15 PM	3:07 PM
28	Park Sienna at Park Antonio	7:32 AM	9:23 AM	11:24 AM	1:16 PM	3:08 PM
29	Park Helena at Park Hacienda	7:33 AM	9:24 AM	11:25 AM	1:17 PM	3:09 PM
30	Park Alisal at Park Corona	7:34 AM	9:25 AM	11:26 AM	1:18 PM	3:10 PM
31	Park Sienna at Park Ailsa I	7:35 AM	9:26 AM	11:27 AM	1:19 PM	3:11 PM
32	Park Sienna at Park Cordero	7:36 AM	9:27 AM	11:28 AM	1:20 PM	3:12 PM
33	Park Sorrento at Park Ora	7:37 AM	9:28 AM	11:29 AM	1:21 PM	3:13 PM
34	Park Sorrento at Park Mirasol	7:39 AM	9:30 AM	11:31 AM	1:23 PM	3:15 PM
35	Park Sorrento at Park Granada	7:40 AM	9:31 AM	11:32 AM	1:24 PM	3:16 PM
36	Calabasas Road at El Canon Avenue	7:41 AM	9:32 AM	11:33 AM	1:25 PM	3:17 PM
37	Mulholland Drive at Valmar Road	7:43 AM	9:34 AM	11:35 AM	1:27 PM	3:19 PM
38	Mulholland Highway at Paul Revere Drive	7:48 AM	9:38 AM	11:40 AM	1:32 PM	3:24 PM
39	Mulholland Highway at Declaration Avenue	7:50 AM	9:40 AM	11:42 AM	1:34 PM	3:26 PM
40	Mulholland Highway at Calabasas High School	7:51 AM	9:41 AM	11:43 AM	1:35 PM	3:27 PM
41	Mulholland Highway at Mobile Home Estates	7:56 AM	9:46 AM	11:48 AM	1:40 PM	3:32 PM
42	Mulholland Highway at Mountain Park Drive	7:58 AM	9:48 AM	11:50 AM	1:42 PM	3:34 PM
43	Mulholland Highway at Viewpoint School	8:01 AM	9:51 AM	11:53 AM	1:45 PM	3:37 PM
44	Old Topanga Canyon Road at Calabasas High School	8:04 AM	9:54 AM	11:56 AM	1:48 PM	3:39 PM
45	Old Topanga Canyon Road at Wrencrest Drive	8:05 AM	9:55 AM	11:57 AM	1:49 PM	3:41 PM
46	Park Sorrento at Park Granada	8:08 AM	9:58 AM	12:00 PM	1:52 PM	3:44 PM
47	Calabasas Road at Commons Way	8:10 AM	10:00 AM	12:02 PM	1:54 PM	3:46 PM
48	Park Sorrento at Civic Center Way (City Hall)	8:11 AM	10:01 AM	12:03 PM	1:55 PM	3:47 PM
						5:49 PM



City of Calabasas  
**Transportation  
DIVISION**

**CALABASAS PUBLIC TRANSPORTATION  
SHUTTLE SERVICE**

# LINE **2AM**

With Stops at A.E. Wright & Lupin Hill

**Hours of operation:**

Monday - Friday

Transit Pass or Transit tickets required.

No service on holidays.

Subject to change without notice.

**Public Information Available:**

Customer Service:

(818) 715-1115

100 Civic Center Way

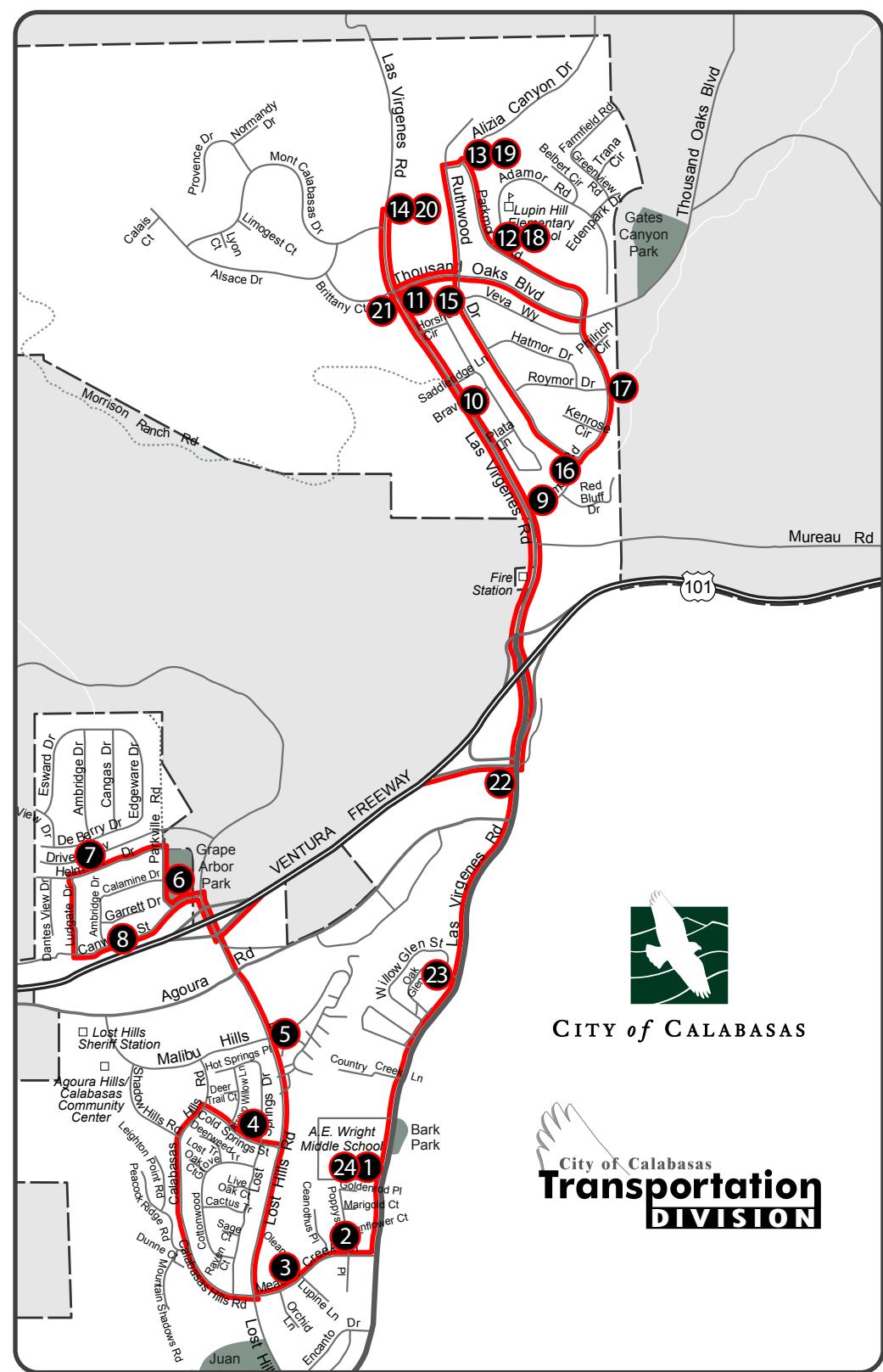
Calabasas, CA 91302

[www.cityofcalabasas.com](http://www.cityofcalabasas.com)

Updated: August 2021

**LINE 2 PEAK ROUTE AM**

STOP	LOCATION	TIMES	TIMES	TIMES
1	Las Virgenes Rd. @ A.E. Wright (South Driveway)	7:07	-	-
2	Meadow Creek Ln. @ Poppyseed Pl.	7:08	-	8:10
3	Meadow Creek Ln. @ Oleander	7:09	-	8:12
4	Lost Springs Rd. @ Cold Springs St.	7:11	-	8:14
5	Lost Hills Rd. @ Malibu Hills Rd.	7:14	-	8:16
6	Parkville Rd. @ Calamine Dr.	7:17	-	8:18
7	Helmond Dr. @ Ludgate Dr.	7:18	-	8:19
8	Canwood St. @ Ambridge Dr.	7:19	-	8:20
9	Las Virgenes Rd. @ Parkmor Rd.	7:23	-	8:24
10	Las Virgenes Rd. @ Bravo Ln.	7:24	-	8:25
11	Las Virgenes Rd. @ Thousand Oaks Blvd. (SE)	7:25	-	8:26
12	Parkmor Rd. @ Adamor Rd. (Lupin Hill)	7:30	-	8:29
13	Parkmor Rd. @ Alizia Canyon Dr.	7:31	-	8:30
14	Las Virgenes Rd. @ Malibu Cyn. Apts. Leasing Ct.	7:34	-	8:32
15	Ruthwood Dr. @ Veva Way	7:40	7:48	-
16	Ruthwood Dr. @ Parkmor Rd.	7:42	7:49	-
17	Parkmor Rd. @ Roymor Dr.	7:44	7:51	-
18	Parkmor Rd. @ Adamor Rd. (Lupin Hill)	7:46	-	-
19	Parkmor Rd. @ Alizia Canyon Dr.	7:47	-	-
20	Las Virgenes Rd. @ Malibu Cyn. Apts. Leasing Ct.	-	7:55	-
21	Las Virgenes Rd. @ Thousand Oaks Blvd. (SW)	-	8:01	8:33
22	Las Virgenes Road @ Shell Station	-	8:05	8:36
23	Las Virgenes Rd. @ Willow Glen St.	-	8:08	8:38
24	Las Virgenes Rd. @ A.E. Wright (South Driveway)	-	8:09	8:40



**CITY of CALABASAS**

**City of Calabasas  
Transportation  
DIVISION**

**CALABASAS PUBLIC TRANSPORTATION  
SHUTTLE SERVICE**

# LINE **2PM**

With Stops at A.E. Wright & Lupin Hill

**Hours of operation:**

Monday - Friday

Transit Pass or Transit tickets required.

No service on holidays.

Subject to change without notice.

**Public Information Available:**

Customer Service:

(818) 715-1115

100 Civic Center Way

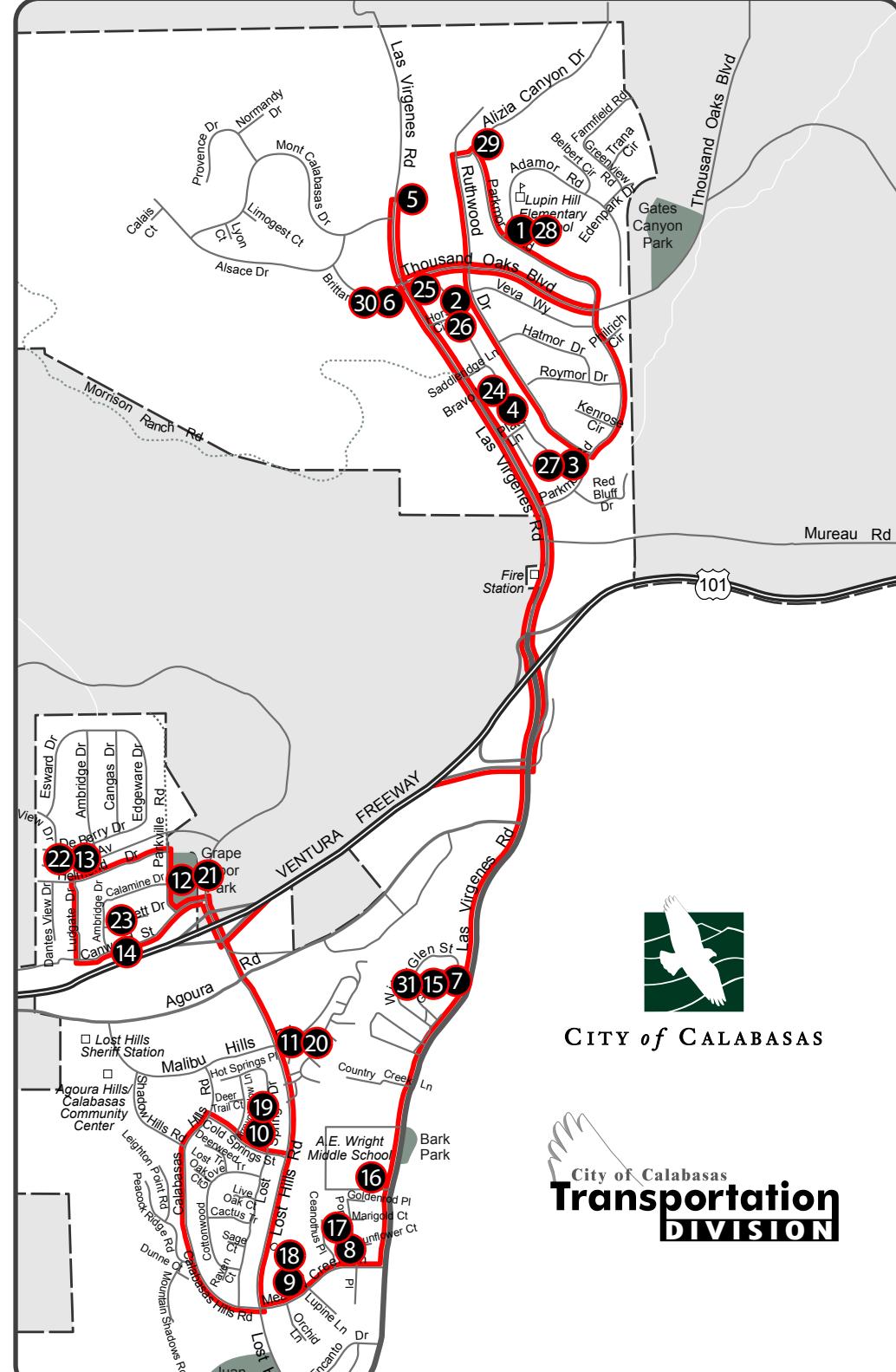
Calabasas, CA 91302

[www.cityofcalabasas.com](http://www.cityofcalabasas.com)

Updated: August 2021

**LINE 2 PEAK ROUTE PM**

STOP	LOCATION	TIMES	TIMES	WED
1	Parkmor Rd. @ Adamor Rd. (Lupin Hill @ top of the hill)	2:15	2:40	12:30
2	Ruthwood Dr. @ Veva Way	2:16	2:41	12:31
3	Ruthwood Dr. @ Parkmor Rd.	2:17	2:42	12:32
4	Las Virgenes Rd. @ Bravo Ln.	2:19	2:44	12:34
5	Las Virgenes Rd. @ Malibu Cyn. Apts. Leasing Ct.	2:20	2:44	12:35
6	Las Virgenes Rd. @ Thousand Oaks Blvd. (SW)	2:22	2:46	12:36
7	Las Virgenes Rd. @ Willow Glen St.	2:24	2:48	12:39
8	Meadow Creek Ln. @ Poppyseed Pl.	2:25	2:49	12:40
9	Meadow Creek Ln. @ Oleander	2:26	2:50	12:41
10	Lost Springs Rd. @ Cold Springs St.	2:27	2:51	12:43
11	Lost Hills Rd. @ Malibu Hills Rd.	2:32	2:56	12:48
12	Parkville Rd. @ Calamine Dr.	2:35	2:59	12:52
13	Helmond Dr. @ Ludgate Dr.	2:36	3:00	12:53
14	Canwood St. @ Ambridge Dr.	2:37	3:01	12:54
15	Las Virgenes Rd. @ Willow Glen St.	-	3:06	12:59
16	Las Virgenes Rd. @ A.E. Wright (South Driveway)	-	3:20	2:20
17	Meadow Creek Ln. @ Poppyseed Pl.	-	3:21	2:21
18	Meadow Creek Ln. @ Oleander	-	3:22	2:22
19	Lost Springs Rd. @ Cold Springs St.	-	3:23	2:23
20	Lost Hills Rd. @ Malibu Hills Rd.	-	3:26	2:26
21	Parkville Rd. @ Calamine Dr.	-	3:29	2:29
22	Helmond Dr. @ Ludgate Dr.	-	3:30	2:30
23	Canwood St. @ Ambridge Dr.	-	3:31	2:31
24	Las Virgenes Rd. @ Bravo Ln.	-	3:36	2:36
25	Las Virgenes Rd. @ Thousand Oaks Blvd. (SE)	-	3:37	2:37
26	Ruthwood Dr. @ Veva Way	-	3:39	2:39
27	Ruthwood Dr. @ Parkmor Rd.	-	3:40	2:40
28	Parkmor Rd. @ Adamor Rd.	-	3:42	2:42
29	Parkmor Rd. @ Alizia Canyon Dr.	-	3:43	2:43
30	Las Virgenes Rd. @ Thousand Oaks Blvd. (SW)	-	3:45	2:45
31	Las Virgenes Rd. @ Willow Glen St.	-	3:48	2:48



**CITY of CALABASAS**

**City of Calabasas  
Transportation  
DIVISION**

## CALABASAS PUBLIC TRANSPORTATION SHUTTLE SERVICE

# LINE 3AM

**Hours of operation:**  
 Monday - Friday  
 Transit Pass or Transit tickets required.  
 No service on holidays.  
 Subject to change without notice.

**Public Information Available:**  
 Customer Service:  
 (818) 715-1115

100 Civic Center Way  
 Calabasas, CA 91302  
[www.cityofcalabasas.com](http://www.cityofcalabasas.com)

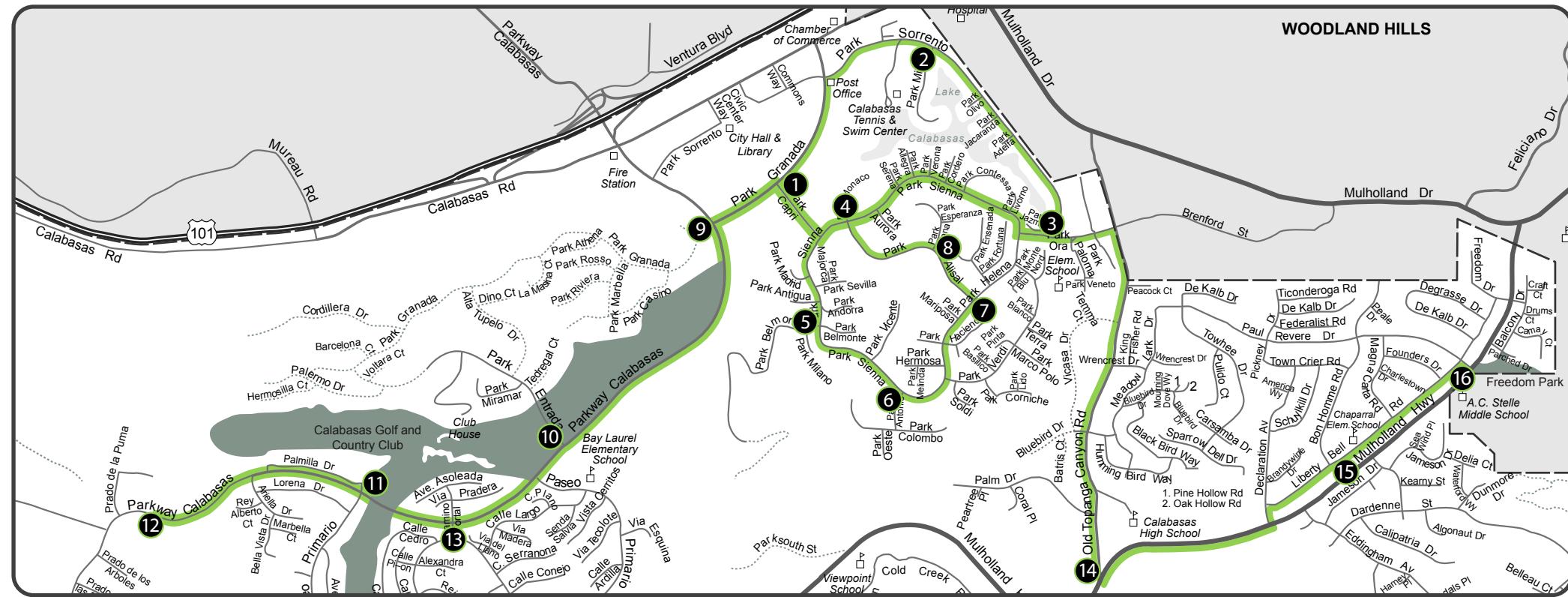
**With Stops at Chaparral, A.C. Stelle, Calabasas High**



CITY of CALABASAS

LINE 3A + 3B AM PEAK ROUTE		
CHAPARRAL, A.C. STELLE, CALABASAS HIGH		TIMES
STOP	LOCATION	
1	Park Granada @ Park Capri	7:15 AM
2	Park Sorrento @ Park Mirasol	7:17 AM
3	Park Ora @ Park Sorrento	7:19 AM
4	Park Sienna @ Park Monaco	7:20 AM
5	Park Sienna @ Park Belmonte	7:21 AM
6	Park Sienna @ Park Antonio	7:22 AM
7	Park Helena @ Park Alisal	7:23 AM
8	Park Alisal @ Park Corona	7:24 AM
9	Parkway Calabasas @ Park Granada	7:26 AM
10	Parkway Calabasas @ Park Entrada	7:27 AM
11	Parkway Calabasas @ Palmilla Dr.	7:29 AM
12	Parkway Calabasas @ Oaks Gate	7:30 AM
13	Parkway Calabasas @ Camino Portal	7:31 AM
14	Old Topanga Canyon Rd. @ C.H.S.	7:45 AM
15	Liberty Bell Rd. @ Chaparal School	7:50 AM
16	Mulholland Hwy @ Paul Revere Dr. (A.C. Stelle)	8:00 AM

Updated: August 2021



**CALABASAS PUBLIC TRANSPORTATION SHUTTLE SERVICE**

# LINE 3PM

**Hours of operation:**

Monday - Friday

Transit Pass or Transit tickets required.

No service on holidays.

Subject to change without notice.

**Public Information Available:**

Customer Service:

(818) 715-1115

100 Civic Center Way  
Calabasas, CA 91302  
[www.cityofcalabasas.com](http://www.cityofcalabasas.com)



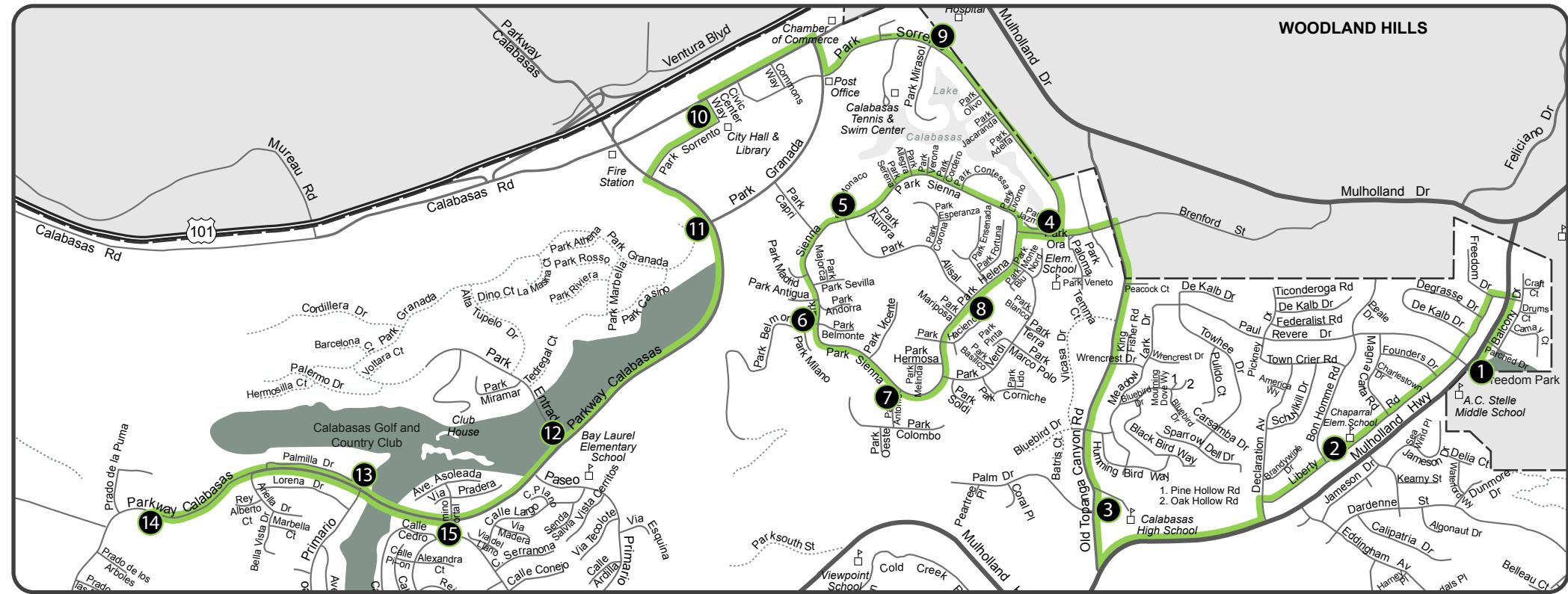
CITY of CALABASAS

City of Calabasas  
**Transportation**  
DIVISION

**With Stops at Chaparral, A.C. Stelle, Calabasas High**

<b>STOP</b>	<b>LOCATION</b>	<b>LINE 3PM PEAK ROUTE</b>		
		<b>M,T,TH,F</b>	<b>M-F</b>	<b>Wed</b>
1	Mulholland Hwy. @ Paul Revere Dr. (A.C. Stelle)	2:40	-	12:35
2	Liberty Bell Rd. @ Chaparral School	2:45	-	12:40
3	Old Topanga Canyon Rd. @ C.H.S.	-	3:40	-
4	Park Ora @ Park Sorrento	2:55	3:45	12:45
5	Park Sienna @ Park Monaco	2:56	3:46	12:46
6	Park Sienna @ Park Belmonte	2:57	3:47	12:47
7	Park Sienna @ Park Antonio	2:59	3:49	12:49
8	Park Helena @ Park Alisal	3:02	4:02	12:52
9	Park Sorrento @ Park Mirasol	3:07	4:07	12:57
10	Civic Center Way@ Park Sorrento(City Hall)	3:10	4:10	1:00
11	Parkway Calabasas @ Park Granada	3:12	4:12	1:02
12	Parkway Calabasas @ Park Entrada	3:13	4:13	1:03
13	Parkway Calabasas @ Camino Portal	3:14	4:14	1:04
14	Parkway Calabasas @ Oaks Gate	3:15	4:15	1:05
15	Parkway Calabasas @ Palmilla Dr.	3:16	4:16	1:06
16	Mulholland Hwy @ Mobile Home Estates	-	4:30	-

Updated: August 2021



## CALABASAS PUBLIC TRANSPORTATION SHUTTLE SERVICE

# LINE 4AM

**Hours of operation:**  
Monday - Friday  
Transit Pass or Transit tickets required.  
No service on holidays.  
Subject to change without notice.

**Public Information Available:**  
 (818) 715-1115

100 Civic Center Way  
Calabasas, CA 91302  
[www.cityofcalabasas.com](http://www.cityofcalabasas.com)

**With Stops at Chaparral and A.C. Stelle**



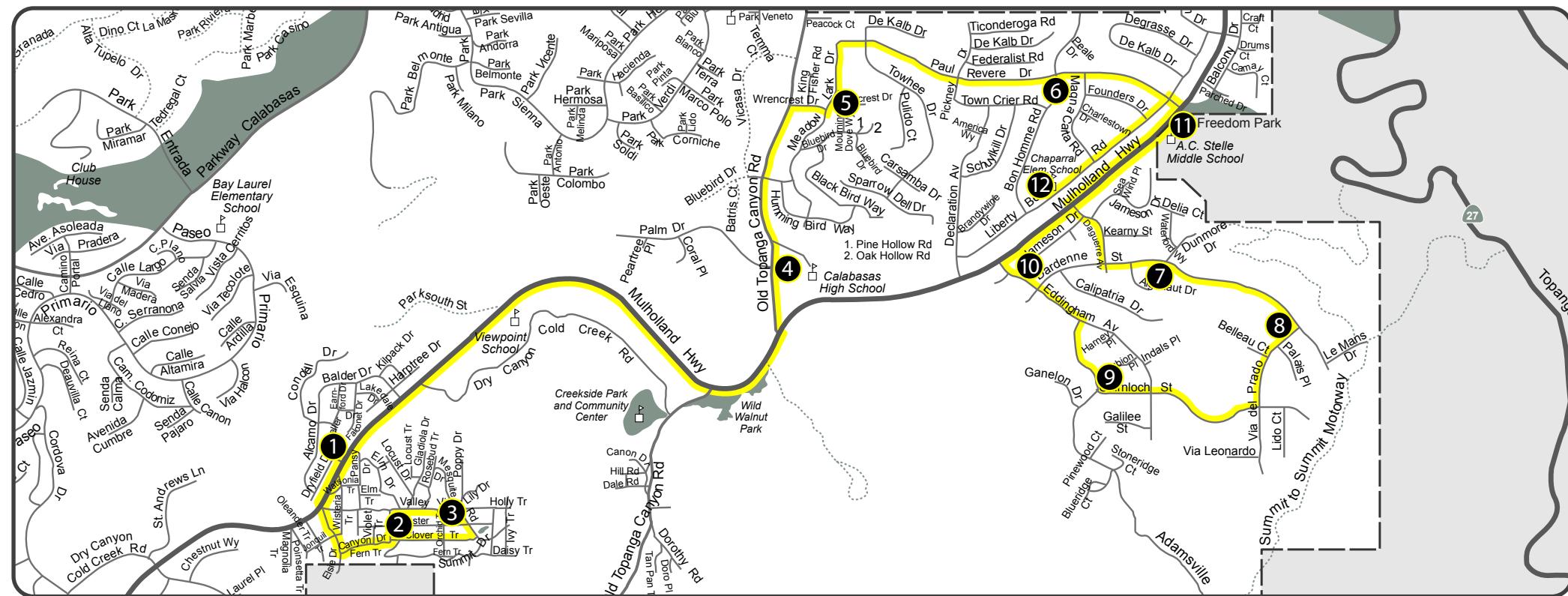
CITY of CALABASAS

Updated: August 2021

### LINE 4A AM PEAK ROUTE

#### CHAPARRAL AND A.C. STELLE ONLY

STOP	LOCATION	TIMES
1	Mulholland Hwy. @ Mobile Home Estates	7:15
2	Canyon Dr. @ Aster Tr.	7:17
3	Valley View Rd. @ Poppy Dr.	7:18
4	Old Topanga Canyon Rd. @ C.H.S.	7:23
5	Meadow Lark Dr. @ Wrencrest Dr.	7:25
6	Paul Revere Dr. @ Bon Homme Rd.	7:26
7	Dardenne St. @ Dunmore Dr.	7:29
8	Dardenne St. @ Via del Prado	7:31
9	Cairnloch St. @ Adamsville Av.	7:33
10	Eddington Av. @ Jameson Dr.	7:35
11	Mulholland Hwy. @ Paul Revere Dr. (A.C. Stelle)	7:38
12	Liberty Bell Rd. @ Chaparral Elementary School	7:40



## CALABASAS PUBLIC TRANSPORTATION SHUTTLE SERVICE

# LINE 4PM

**With Stops at Chaparral and A.C. Stelle**



CITY of CALABASAS

**Hours of operation:**  
Monday - Friday  
Transit Pass or Transit tickets required.  
No service on holidays.

Subject to change without notice.

**Public Information Available:**

Customer Service:

(818) 715-1115

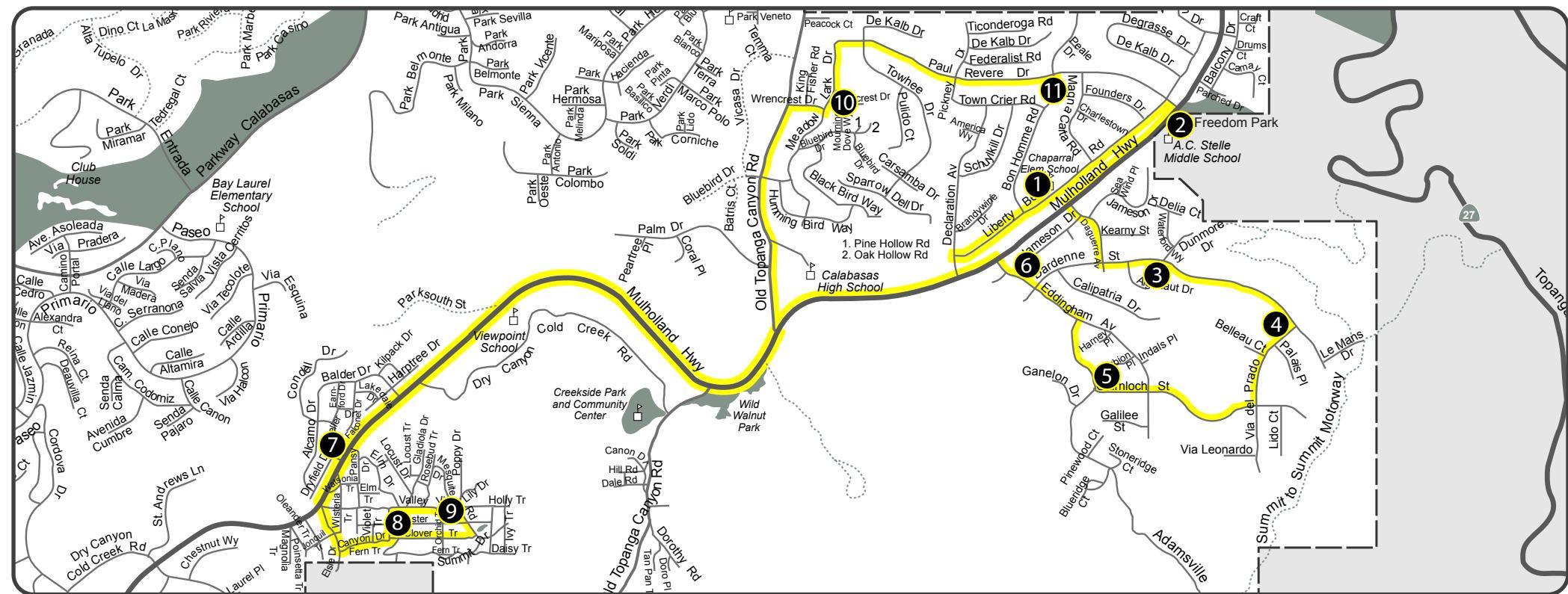
100 Civic Center Way  
Calabasas, CA 91302  
[www.cityofcalabasas.com](http://www.cityofcalabasas.com)

### LINE 4A PM PEAK ROUTE

#### CHAPARRAL AND A.C. STELLE ONLY

STOP	LOCATION	M,T,TH,F	WED
1	Liberty Bell Rd. @ Chaparral Elementary School	2:40	12:35
2	Mulholland Hwy. @ Paul Revere Dr. (A.C. Stelle)	2:45	12:40
3	Dardenne St. @ Dunmore Dr.	2:49	12:44
4	Dardenne St. @ Via del Prado	2:50	12:45
5	Cairnloch St. @ Adamsville Av.	2:52	12:47
6	Eddington Av. @ Jameson Dr.	2:54	12:49
7	Mulholland Hwy. @ Mobile Home Estates	2:59	12:54
8	Canyon Dr. @ Aster Tr.	3:01	12:56
9	Valley View Rd. @ Poppy Dr.	3:03	12:58
10	Meadow Lark Dr. @ Wrencrest Dr.	3:11	1:06
11	Paul Revere Dr. @ Bon Homme Rd.	3:12	1:07

Updated: August 2019



**CALABASAS PUBLIC TRANSPORTATION  
SHUTTLE SERVICE**

# LINE **5AM**

With Stop at C.H.S.

**Hours of operation:**  
Monday - Friday  
Transit Pass or Transit tickets required.  
No service on holidays.  
Subject to change without notice.

**Public Information Available:**

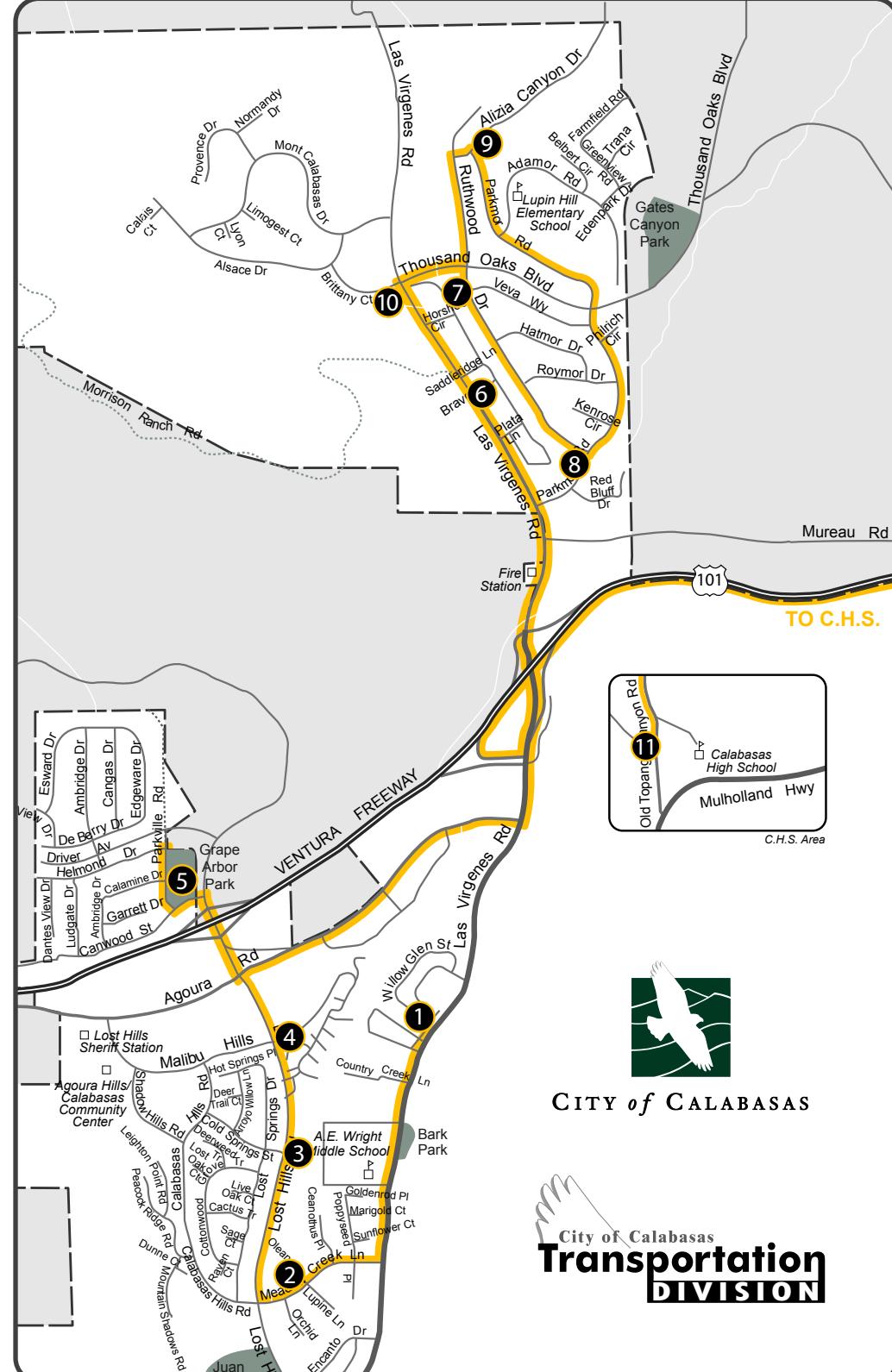
AMMC • 811 • 911

(818) 511-1FF1

100 Civic Center Way  
Calabasas, CA 91302  
[www.cityofcalabasas.com](http://www.cityofcalabasas.com)

Updated: August 2021

<b>LINE 5 AM PEAK ROUTE</b>		
<b>CALABASAS HIGH SCHOOL ONLY</b>		
<b>STOP</b>	<b>LOCATION</b>	<b>M-F</b>
1	Las Virgenes Rd. @ Willow Glen St.	7:10
2	Meadow Creek Ln. @ Oleander	7:12
3	Lost Hills Rd. @ Cold Springs St.	7:13
4	Lost Hills Rd. @ Malibu Hills Rd.	7:14
5	Parkville Rd. @ Grape Arbor Park	7:17
6	Las Virgenes Rd. @ Bravo Ln.	7:22
7	Ruthwood Dr. @ Veva Way	7:24
8	Ruthwood Dr. @ Parkmor Rd.	7:25
9	Parkmor Rd. @ Alizia Canyon Dr.	7:27
10	Las Virgenes Rd. @ Thousand Oaks Blvd. (SW)	7:30
11	Old Topanga Canyon Rd. @ C.H.S.	7:55



**CITY of CALABASAS**

**City of Calabasas  
Transportation  
DIVISION**

**CALABASAS PUBLIC TRANSPORTATION  
SHUTTLE SERVICE**

# LINE **5PM**

With Stop at C.H.S.

**Hours of operation:**  
Monday - Friday  
Transit Pass or Transit tickets required.  
No service on holidays.  
Subject to change without notice.

**Public Information Available:**

AMMC • d { ^!À^çÅK

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(818) 1 FI -1FF1

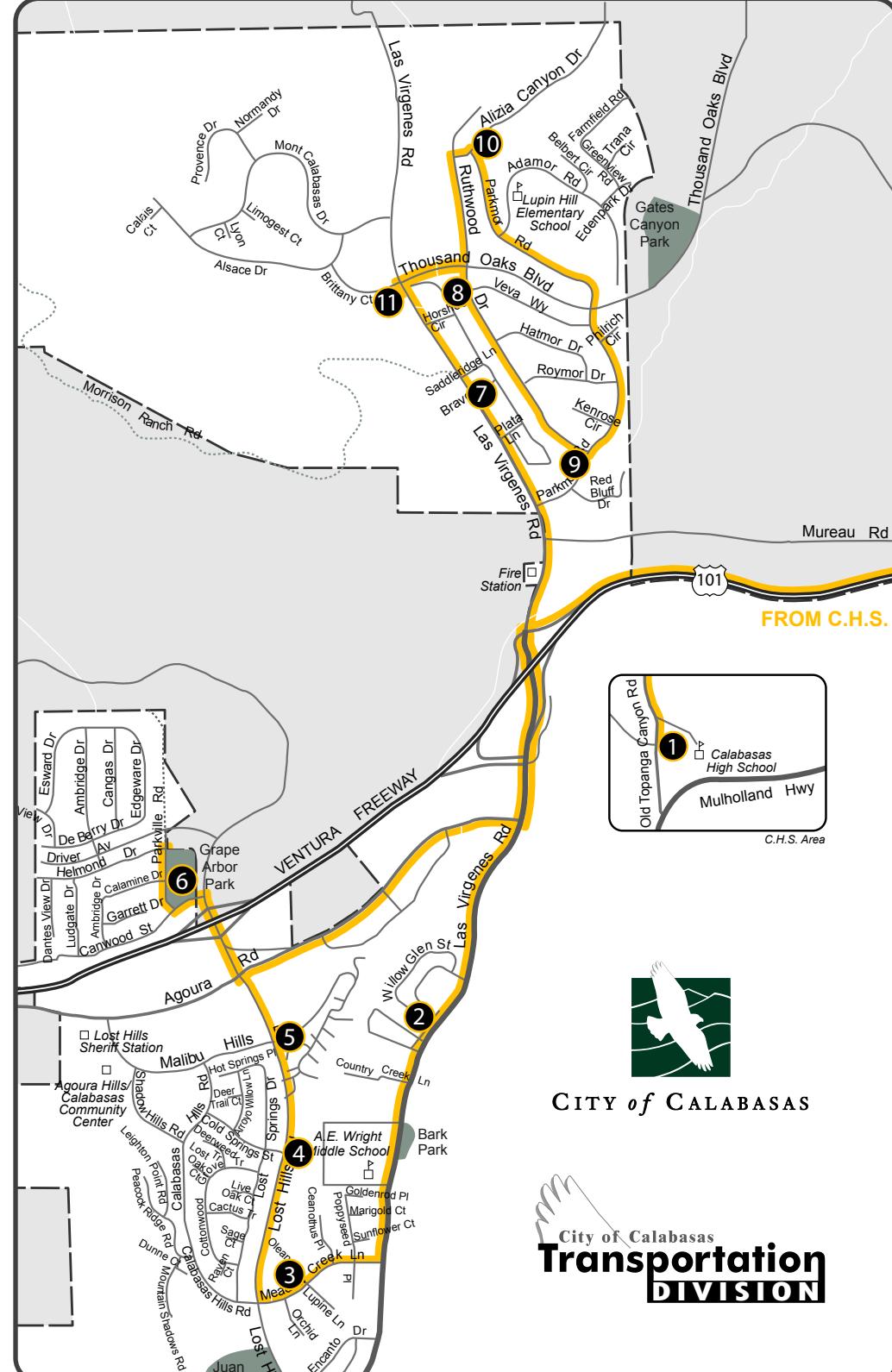
100 Civic Center Way  
Calabasas, CA 91302  
[www.cityofcalabasas.com](http://www.cityofcalabasas.com)

Updated: August 2021

## LINE 5 PM PEAK ROUTE

### CALABASAS HIGH SCHOOL ONLY

STOP	LOCATION	M-F
1	Old Topanga Canyon Rd. @ C.H.S.	3:35
2	Las Virgenes Rd. @ Willow Glen St.	3:50
3	Meadow Creek Ln. @ Oleander	3:53
4	Lost Hills Rd. @ Cold Springs St.	3:55
5	Lost Hills Rd. @ Malibu Hills Rd.	3:56
6	Parkville Rd. @ Grape Arbor Park	3:59
7	Las Virgenes Rd. @ Bravo Ln.	4:05
8	Ruthwood Dr. @ Veva Way	4:08
9	Ruthwood Dr. @ Parkmor Rd.	4:09
10	Parkmor Rd. @ Alizia Canyon Dr.	4:13
11	Las Virgenes Rd. @ Thousand Oaks Blvd. (SW)	4:17



# CALABASAS TROLLEY SCHEDULE



**For Saturday  
Service**

**FREE - NO CHARGE**



**Hours of operation are:  
Saturdays: 10am to 2pm**

The Calabasas Trolley performs a loop route in one direction throughout the City. A route map is included on the backside of this schedule for your convenience.

There is no charge to ride the Calabasas Trolley. For more information, contact the Calabasas Transportation/Transit Division at (818) 224-1673.



CITY of CALABASAS

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Calabasas CA 91302  
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(818) 224-1600

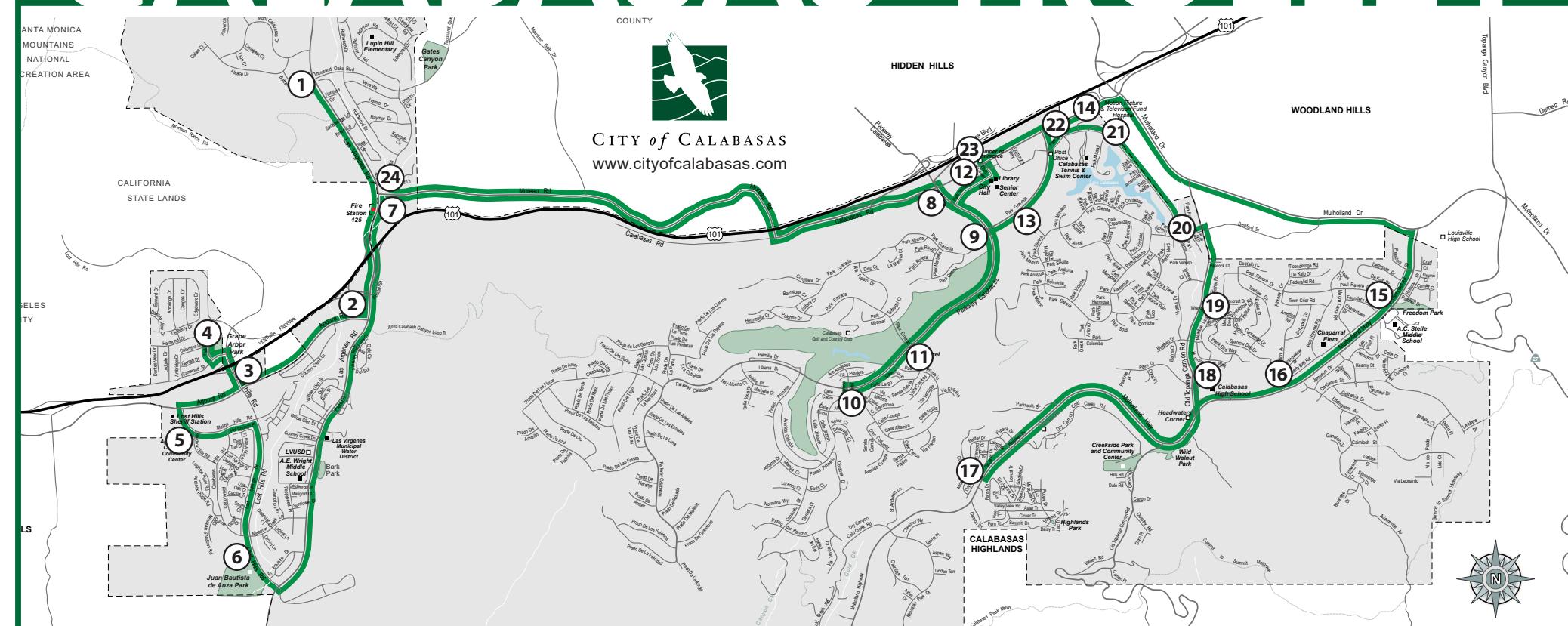
STOP	LOCATION	TIME
1	Las Virgenes Road @ Thousand Oaks Boulevard	0:00
2	Agoura Road @ Las Virgenes Road (Albertson's)	0:03
3	Agoura Road @ Lost Hills Road (Summit)	0:04
4	Parkville Rd. @ Grape Arbor Park	0:05
5	Malibu Hills Rd. @ Agoura Rd. (Community Center)	0:08
6	Lost Hills Rd. @ Las Virgenes Rd. (de Anza Park)	0:10
7	Mureau Road @ Las Virgenes Road	0:16
8	Parkway Calabasas @ Calabasas Road	0:22
9	Parkway Calabasas @ Park Granada	0:23
10	Parkway Calabasas @ Camino Portal	0:25
11	Parkway Calabasas @ Paseo Primario (North)	0:26
12	Park Sorrento @ Civic Center Way (Civic Center)	0:28
13	Park Granada @ Park Capri	0:29
14	Calabasas Road @ El Canon (Old Town)	0:31
15	Mulholland Highway @ Paul Revere Drive	0:36
16	Mulholland Highway @ Declaration Avenue	0:37
17	Mulholland Hwy @ Mobil Home Park	0:40
18	Old Topanga Cyn @ Calabasas High School	0:43
19	Old Topanga Cyn @ Wrencrest Drive	0:44
20	Park Sorrento @ Park Ora	0:45
21	Park Sorrento @ Park Mirasol (Tennis & Swim Center)	0:47
22	Park Sorrento @ Park Granada	0:48
23	Park Sorrento @ Civic Center Way (Civic Center)	0:51
24	Mureau Rd. @ Las Virgenes Rd. (NE)	0:58

7/2023

All times noted are minutes after each hour.

Subject to change without notice.

# CALABASAS TROLLEY



7/2023

STOP	LOCATION	TIME
1	Las Virgenes Road @ Thousand Oaks Boulevard	0:00
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Saturday Trolley hours: 10am to 2pm

STOP	LOCATION	TIME
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- Subject to change without notice.
- Public information available at the Calabasas Transportation / Transit Division (818) 224-1673