

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

BOARD OF DIRECTORS REGULAR MEETING AGENDA
JANUARY 14, 2005 (Second Friday of Each Month)
SCMTD ENCINAL CONFERENCE ROOM*
370 ENCINAL STREET, SUITE 100
SANTA CRUZ, CALIFORNIA
9:00 a.m. – 11:00 a.m.

THE BOARD AGENDA PACKET CAN BE FOUND ONLINE AT WWW.SCMTD.COM

NOTE: THE BOARD CHAIR MAY TAKE ITEMS OUT OF ORDER

SECTION I: OPEN SESSION - 9:00 a.m.

1. ROLL CALL
2. ORAL AND WRITTEN COMMUNICATION
 - a. None
3. LABOR ORGANIZATION COMMUNICATIONS
4. ADDITIONAL DOCUMENTATION TO SUPPORT EXISTING AGENDA ITEMS

CONSENT AGENDA

- 5-1. APPROVE REGULAR BOARD MEETING MINUTES OF DECEMBER 10 AND DECEMBER 17, 2004
Minutes: Attached
- 5-2. ACCEPT AND FILE PRELIMINARILY APPROVED CLAIMS
Report: Attached
- 5-3. ACCEPT AND FILE DECEMBER 2004 RIDERSHIP REPORT
Report: Attached
PAGE 1 OF THE RIDERSHIP REPORT WILL BE INCLUDED IN THE JANUARY 28, 2005 BOARD PACKET
- 5-4. CONSIDERATION OF TORT CLAIMS: DENY THE CLAIM OF JACKIE LYNN MARQUEZ, CLAIM #05-0003
- 5-5. ACCEPT AND FILE THE METRO ADVISORY COMMITTEE (MAC) AGENDA FOR JANUARY 19, 2005 AND MINUTES OF NOVEMBER 17, 2004
Agenda/Minutes: Attached

- 5-6. ACCEPT AND FILE THE MASTF COMMITTEE MINUTES OF DECEMBER 16, 2004
Agenda/Minutes: **WILL BE INCLUDED IN THE JANUARY 28, 2005 BOARD PACKET**
- 5-7. ACCEPT AND FILE MONTHLY BUDGET STATUS REPORT FOR NOVEMBER 2004 AND APPROVAL OF BUDGET TRANSFERS
Staff Report: Attached
- 5-8. ACCEPT AND FILE PARACRUZ STATUS REPORT FOR OCTOBER 2004
Staff Report: Attached
- 5-9. ACCEPT AND FILE HIGHWAY 17 STATUS REPORT FOR OCTOBER AND NOVEMBER 2004
Staff Report: Attached
- 5-10. ACCEPT AND FILE UNIVERSITY OF CALIFORNIA, SANTA CRUZ SERVICE UPDATE
Staff Report: Attached
- 5-11. ACCEPT AND FILE METROBASE STATUS REPORT
Staff Report: **WILL BE INCLUDED IN THE JANUARY 28, 2005 BOARD PACKET**
- 5-12. ACCEPT AND FILE MINUTES REFLECTING VOTING RESULTS FROM APPOINTEES TO THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION FOR THE DECEMBER MEETING
Staff Report: Attached
- 5-13. ACCEPT AND FILE NOTIFICATION OF ACTIONS TAKEN IN CLOSED SESSION REGARDING THE WORKERS COMPENSATION CLAIM OF GUILLERMO CHAVEZ
Staff Report: Attached
- 5-14. REVIEW AND ACCEPT SANTA CRUZ METRO BYLAWS AS MODIFIED REGARDING SECTIONS 6.01 (ELECTION OF PRESIDING OFFICERS) AND 14.02 (APPOINTMENT OF SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION REPRESENTATIVES)
Staff Report: Attached

REGULAR AGENDA

6. PRESENTATION OF EMPLOYEE LONGEVITY AWARDS
Presented by: Chairperson Reilly
Staff Report: Attached
THIS PRESENTATION WILL TAKE PLACE AT THE JANUARY 28, 2005 BOARD MEETING

7. CONSIDERATION OF RECEIPT OF REPORT REGARDING THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION'S PARATRANSIT COORDINATION TASK FORCE (PCTF) AND DRAFT MINUTES OF DECEMBER 15, 2004

Presented by: Director Pat Spence

Staff Report: December 15, 2004 Draft Minutes are attached

8. CONSIDERATION OF STATUS OF REPORT ON POSSIBLE PARACRUZ REPORTING FORMATS

Presented by: Bryant Baehr, Operations Manager

Staff Report: **WILL BE INCLUDED IN THE JANAUARY 28, 2005 BOARD PACKET**

9. CONSIDERATION OF AWARD OF CONTRACT FOR THIRD PARTY ADMINISTRATION OF WORKERS COMPENSATION CLAIMS

Presented by: Tom Stickel, Fleet Maintenance Manager

Staff Report: **WILL BE INCLUDED IN THE JANAUARY 28, 2005 BOARD PACKET**

10. CONSIDERATION OF RENEWAL OF CONTRACT FOR HAZARDOUS WASTE REMOVAL SERVICES

Presented By: Tom Stickel, Fleet Maintenance Manager

Staff Report: Attached

ACTION REQUESTED AT THE JANUARY 14, 2005 BOARD MEETING

11. CONSIDERATION OF RENEWAL OF CONTRACT FOR FINANCIAL AUDIT AND TAX SERVICES

Presented By: Tom Stickel, Fleet Maintenance Manager

Staff Report: Attached

12. CONSIDERATION OF AWARD OF CONTRACT FOR PURCHASE OF VEHICLES

Presented By: Tom Stickel, Fleet Maintenance Manager

Staff Report: Attached

13. CONSIDERATION OF AWARD OF CONTRACT FOR PURCHASE OF LUBRICATION PRODUCTS

Presented By: Tom Stickel, Fleet Maintenance Manager

Staff Report: Attached

14. CONSIDERATION OF A **RESOLUTION** AUTHORIZING AN APPLICATION TO CALTRANS FOR FY 2005 RURAL OPERATING ASSISTANCE

Presented By: Mark Dorfman, Assistant General Manager

Staff Report: Attached

RESOLUTION REQUIRES A ROLL CALL VOTE

15. CONSIDERATION OF CALL STOP AUDIT REPORT
Presented By: Bryant Baehr, Operations Manager
Staff Report: Attached
16. CONSIDERATION OF NOMINATION OF DIRECTORS TO SERVE AS BOARD OFFICERS FOR 2005, AND NOMINATIONS FOR APPOINTMENTS TO THE HIGHWAY 1 CONSTRUCTION AUTHORITY AND TO THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION FOR 2005
Presented By: Les White, General Manager
Staff Report: Attached

ACTION REQUESTED AT THE JANUARY 14, 2005 BOARD MEETING

17. REVIEW OF ITEMS TO BE DISCUSSED IN CLOSED SESSION: District Counsel
18. ORAL AND WRITTEN COMMUNICATIONS REGARDING CLOSED SESSION

SECTION II: CLOSED SESSION

1. CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION
(Pursuant to Government Code Section 54956.9)
 - a. Name of Case: Frank Sloan vs. Santa Cruz Metropolitan Transit District
(Before the Workers' Compensation Appeals Board)
 - b. Name of Case: Fredy Castillo vs. Santa Cruz Metropolitan Transit District
 - c. Name of Case: Santa Cruz Metropolitan Transit District vs. Yvonne Aiassa Humphrey; Surf City Produce; Odwalla, Inc, et al.
2. CONFERENCE WITH LABOR NEGOTIATOR
(Pursuant to Government Code Section 54957.6)
 - a. Agency Negotiator: Les White, General Manager
 1. Employee Organization: Service Employees International Union (SEIU), Local 415

SECTION III: RECONVENE TO OPEN SESSION

19. REPORT OF CLOSED SESSION

ADJOURN

NOTICE TO PUBLIC

Members of the public may address the Board of Directors on a topic not on the agenda but within the jurisdiction of the Board of Directors or on the consent agenda by approaching the Board during consideration of Agenda Item #2 "Oral and Written Communications", under Section I. Presentations will be limited in time in accordance with District Resolution 69-2-1.

When addressing the Board, the individual may, but is not required to, provide his/her name and address in an audible tone for the record.

Members of the public may address the Board of Directors on a topic on the agenda by approaching the Board immediately after presentation of the staff report but before the Board of Directors' deliberation on the topic to be addressed. Presentations will be limited in time in accordance with District Resolution 69-2-1.

The Santa Cruz Metropolitan Transit District does not discriminate on the basis of disability. The Encinal Conference Room is located in an accessible facility. Any person who requires an accommodation or an auxiliary aid or service to participate in the meeting, please contact Cindi Thomas at 831-426-6080 as soon as possible in advance of the Board of Directors meeting. Hearing impaired individuals should call 711 for assistance in contacting METRO regarding special requirements to participate in the Board meeting.

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

Minutes- Board of Directors

December 10, 2004

A Regular Meeting of the Board of Directors of the Santa Cruz Metropolitan Transit District met on Friday, December 10, 2004 at the District's Administrative Office, 370 Encinal Street, Santa Cruz, CA.

Vice Chair Keogh called the meeting to order at 9:01 a.m.

SECTION 1: OPEN SESSION

Vice Chair Keogh introduced Director Dene Bustichi, who was appointed by the Scotts Valley City Council to replace Director Sheryl Ainsworth.

1. ROLL CALL:

DIRECTORS PRESENT

Jan Beautz (arrived after roll call)
Dene Bustichi
Michelle Hinkle
Mike Keogh
Dennis Norton
Mike Rotkin (arrived after roll call)
Dale Skillicorn
Pat Spence
Mark Stone (arrived after roll call)
Marcela Tavantzis

DIRECTORS ABSENT

Emily Reilly
Ex-Officio Wes Scott

STAFF PRESENT

Bryant Baehr, Operations Manager
Frank Cheng, MetroBase Project Manager
Mark Dorfman, Assistant General Manager
Margaret Gallagher, District Counsel
Elisabeth Ross, Finance Manager

Robyn Slater, Human Resources Manager
Judy Souza, Base Superintendent
Tom Stickel, Fleet Maintenance Manager
Les White, General Manager

EMPLOYEES AND MEMBERS OF THE PUBLIC WHO VOLUNTARILY INDICATED THEY WERE PRESENT

Dennis Bar, PG&E
Jane Barr, Via Del Mar
Jeff Le Blanc, MASTF

Bonnie Morr, UTU
John Perez
Bob Yount, MAC/MASTF/E&D TAC

S-1.1

2. ORAL AND WRITTEN COMMUNICATION

Written:

- | | | |
|----|-------------------|---------------------------|
| a. | Pat Clarke | Re: Bus Operator Retiring |
| b. | Linda Wilshusen | Re: Thank You Card |
| c. | Peter Katzlberger | Re: ParaCruz Service |

Oral:

Director Spence reported that both Congressman Sam Farr and Assembly Member John Laird attended the December 2, 2004 SCCRTC meeting to give an update on the appropriations billed that passed and that METRO had received \$1.5 million. Director Spence also reported that this had been Linda Wilshusen's last meeting and that the Red Cross now has wheelchair accessible vehicles.

DIRECTOR ROTKIN ARRIVED AT THIS TIME

Jeff Le Blanc invited everyone to MASTF's 16th anniversary meeting on Thursday, December 16th at 2:00 p.m. in the NIAC building. MASTF is going on hiatus and will meet again next November, unless there is a need to meet prior to that time. Four MASTF Appreciation Awards will be presented on the 16th to CCCIL, Sam Storey, Bryant Baehr and Sharon Barbour.

3. LABOR ORGANIZATION COMMUNICATIONS

Bonnie Morr had written communications from bus operators regarding workers compensation claims. Vice Chair Keogh directed Ms. Morr to forward these documents to the Human Resources Manager and reminded her that this was not the proper venue for this type of communication. Ms. Morr was also concerned about eliminated parking spaces in front of the Tool Shed property on River Street and was directed to forward this matter to Frank Cheng, MetroBase Project Manager.

4. ADDITIONAL DOCUMENTATION TO SUPPORT EXISTING AGENDA ITEMS

A Staff Report for Item #16 was distributed.

ITEM #15 WAS TAKEN OUT OF ORDER AT THIS TIME

15. **RE-CONSIDERATION OF GRANTING A RIGHT OF WAY TO PG&E TO LOCATE A TRANSFORMER ON THE VIA DEL MAR PROJECT SITE, LOCATE PG&E LINES UNDERNEATH THE WATSONVILLE TRANSIT CENTER SIDEWALK AND ALLOW ACCESS TO THE TRANSFORMER VIA THE TRANSIT CENTER**

Summary:

Margaret Gallagher reported that she had been working with Jane Barr, Via Del Mar Project Manager, and PG&E over the past week to include language in the Right of Way agreement to ensure that at the most only one lane would be blocked at the Watsonville Transit Center should PG & E need to perform work or the transformer needed to be worked on and that METRO would be given a minimum of 5-days notice for routine maintenance.

5-1.2

ACTION: MOTION: DIRECTOR NORTON SECOND: DIRECTOR ROTKIN

Approve granting Right of Way to allow PG&E to locate a transformer at the Via Del Mar site, run PG&E lines to the transformer underneath the Watsonville Transit Center sidewalk and allow access to the transformer through the Watsonville Transit Center site. Agreement to include the following language: that METRO be given 5-days notice for routine maintenance, rather than 2-days notice and in no event will more than one lane of METRO Transit District's Watsonville Transit Center bus lanes be blocked to prevent bus egress and ingress so the buses will be able to move in accordance with their schedules.

Discussion:

Jane Barr clarified that "Restoration required to as nearly as practicable to the condition prior to excavation" meant that there may be a line in the sidewalk where the new and old concrete meet. Bryant Baehr clarified that this project would not impact Transit Center operations.

Motion passed unanimously with Directors Beautz and Reilly being absent.

CONSENT AGENDA

5-1. APPROVE REGULAR BOARD MEETING MINUTES OF NOVEMBER 12 AND NOVEMBER 19, 2004 AND THE SPECIAL MINUTES OF NOVEMBER 19, 2004

No questions or comments.

5-2. ACCEPT AND FILE PRELIMINARILY APPROVED CLAIMS

No questions or comments.

5-3. ACCEPT AND FILE SEPTEMBER 2004 RIDERSHIP REPORT

Page 1 of the Ridership Report will be included in the December 17, 2004 Board Packet.

5-4. CONSIDERATION OF TORT CLAIMS:

None.

5-5. ACCEPT AND FILE THE METRO ADVISORY COMMITTEE (MAC) AGENDA FOR DECEMBER 15, 2004 AND MINUTES OF OCTOBER 20, 2004

No questions or comments.

5-6. ACCEPT AND FILE AGENDA FOR THE MASTF COMMITTEE MEETING OF DECEMBER 16, 2004 AND THE MINUTES OF THE NOVEMBER 18, 2004 MEETING

Will be included in the December 17, 2004 Board Packet.

5-1.3

5-7. ACCEPT AND FILE MONTHLY BUDGET STATUS REPORT FOR OCTOBER 2004 AND CONSIDERATION OF BUDGET TRANSFERS

Elisabeth Ross reported that everything looks ok with nothing to be particularly concerned about. Sales tax revenue is higher than expected and fare revenue is lower due to the fare increase.

5-8. ACCEPT AND FILE PARACRUZ STATUS REPORT FOR SEPTEMBER 2004

No questions or comments.

5-9. ACCEPT AND FILE HIGHWAY 17 STATUS REPORT FOR OCTOBER 2004

Will be included in the December 17, 2004 Board Packet.

5-10. ACCEPT AND FILE UNIVERSITY OF CALIFORNIA, SANTA CRUZ SERVICE UPDATE

No questions or comments.

5-11. ACCEPT AND FILE METROBASE STATUS REPORT

Will be included in the December 17, 2004 Board Packet.

5-12. ACCEPT AND FILE MINUTES REFLECTING VOTING RESULTS FROM APPOINTEES TO THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION FOR THE NOVEMBER MEETINGS

No questions or comments.

5-13. CONSIDERATION OF APPOINTMENT OF DENNIS PAPADOPULO TO THE METRO ADVISORY COMMITTEE (MAC) BY DIRECTOR SPENCE TO FILL VACANCY OF MICHAEL EDWARDS

No questions or comments

5-14. CONSIDERATION OF REPORT ON APPOINTEE ATTENDANCE AT METRO ADVISORY COMMITTEE (MAC) MEETINGS

Jeff Le Blanc reported that he was present at the November MAC meeting, but the attendance sheet shows him absent¹. Les White clarified that absences are calculated over a rolling 12-month period.

¹ File copy of the MAC Attendance Sheet has been corrected and was redistributed to the Board at their December 17, 2004 meeting.

5-1.4

REGULAR AGENDA

6. PRESENTATION OF EMPLOYEE LONGEVITY AWARDS

This presentation will take place at the December 17, 2004 Board Meeting.

7. CONSIDERATION OF RECEIPT OF REPORT REGARDING THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION'S PARATRANSIT COORDINATION TASK FORCE (PCTF) AND DRAFT MINUTES OF NOVEMBER 17, 2004

No questions or comments.

8. CONSIDERATION OF AWARD OF CONTRACT FOR LONG TERM DISABILITY INSURANCE

Summary:

Tom Stickel reported that the District provides long-term disability insurance for its employees and that the current contract will expire at the end of December 2004. Staff and Union representatives recommend awarding the contract to Driver Alliant.

Discussion:

Robyn Slater clarified that there are approximately 15 total employees out on long-term and short-term disability. This insurance costs \$182,000 per year and METRO is receiving a 15% discount for staying with Driver Alliant.

DIRECTOR BEAUTZ ARRIVED AT THIS TIME

Direction: Director Norton asked for a report back to the Board in January regarding Long-Term Disability Insurance.

ACTION: MOTION: DIRECTOR ROTKIN SECOND: DIRECTOR SKILLICORN

Authorize the General Manager to execute a contract for Long-Term Disability Insurance with Driver Alliant Insurance Services.

Motion passed unanimously with Director Reilly being absent.

9. CONSIDERATION OF PARACRUZ OPERATIONS STATUS REPORT

This presentation will take place at the December 17, 2004 Board Meeting.

10. CONSIDERATION OF A RESOLUTION AMENDING FY 04-05 BUDGET

5-1.5

Will be included in the December 17, 2004 Board Packet.

11. CONSIDERATION OF A RESOLUTION OF APPRECIATION FOR THE SERVICE OF SHERYL AINSWORTH AS A MEMBER OF THE BOARD OF DIRECTORS

This presentation will take place at the December 17, 2004 Board Meeting and Ms. Ainsworth will be in attendance.

12. CONSIDERATION OF NOMINATION OF DIRECTORS TO SERVE AS BOARD OFFICERS FOR 2005, MAKING AN APPOINTMENT TO THE HIGHWAY 1 CONSTRUCTION AUTHORITY AND REVIEWING THE PROCESS FOR THE SELECTION OF APPOINTMENTS TO THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION FOR 2005

Summary:

Mark Dorfman explained that the Board elects its officers in January, with nominations being made in December and elections being held at the first January meeting. Appointments also need to be made to the Highway 1 Construction Authority and the Santa Cruz County Regional Transportation Commission (SCCRTC). The Chair recommends nominees, which can be amended by any member of the Board, and then the elections for the appointments and alternates are made.

Discussion:

There was a discussion regarding the timing of the nominations and elections and whether the current Chair or newly elected Chair would be making nominations. Margaret Gallagher clarified that the Bylaws say nominations for Board officers would be made at the second meeting in December, with elections being held in January. The current Board Chair makes recommendations for nominations to the SCCRTC before the first January meeting and other Board members can make nominations at the first January meeting. Ms. Gallagher recommended amending Section 6.01a of the Bylaws to clarify the nomination, election, and appointment process.

ACTION: MOTION: DIRECTOR ROTKIN SECOND: DIRECTOR BEAUTZ

Direct District Counsel to agendize and bring back a Staff Report to the December 17, 2004 Board meeting amending District Bylaws to allow for following the current District Bylaws with the following exceptions: all voting is to happen at the second meeting in January, which is generally televised, and that all nominations remain open up until the actual vote.

Vice Chair Keogh offered the following friendly amendment, which was accepted by the maker and second of the motion:

Selection of the Board Chair and Vice Chair will take place prior to appointing representatives to the Santa Cruz County Regional Transportation Commission.

5-1.6

Motion passed unanimously with Director Reilly being absent.

VICE CHAIR KEOGH COMBINED ITEMS #13 & #14, STATE AND FEDERAL LEGISLATIVE PROGRAMS.

- 13. CONSIDERATION OF APPROVAL OF 2005 STATE LEGISLATIVE PROGRAM**
14. CONSIDERATION OF APPROVAL OF 2005 FEDERAL LEGISLATIVE PROGRAM

Summary:

Les White explained that each year a proposal is put together for both State and Federal Legislative Programs for advocacy with regard to items needing legislative assistance.

This year on the State level, METRO is going to be on a protective stance because it is likely that Prop 42 will be suspended once again, which is what the voters approved to redirect the sales tax on gasoline into the Transportation Fund rather than the General Fund. Every year since it has passed, approximately \$2.1 billion has been suspended back into the General Fund. This still leaves transportation funding obligations previously allocated from the State, but projects cannot proceed, due to lack of funding. It is absolutely critical that METRO receive earmarked funds for MetroBase in the Transportation account and State Transit Assistance, which is about \$860,000 per year for the next five years. Mr. White then went through the remainder of the State Legislative Program list.

Discussion:

Director Rotkin suggested directing Legal Counsel to look into filing a lawsuit against the Legislature for failure to follow through with the will of the voters.

Director Beautz stated opposition to spending much time advocating for the Yield to Bus program.

Summary:

Mr. White reported that on the Legislative side, METRO will continue to advocate for the High Intensity Transit Tier to be added to the Formula Program for urbanized areas under 200,000 in population, and that it be funded at \$35 million in FY2005 and increase every year of the Authorization Bill to reach a level of \$54 million in 2009. METRO would receive approximately \$1 million per year in supplemental capital funding once it begins and would escalate in the out years, which is critical because it has all been pledged to MetroBase. This funding can only come by formula. Mr. White then went through the remainder of the Legislative Program list.

Discussion:

Les White clarified that #7 on Federal Legislative Program list explaining that METRO is requesting \$1.5 per year earmark until a total of \$8.6 million is received for the Metro Center Pacific Station Redevelopment Project.

5-1.7

Director Tavantzis said she is preparing the city of Watsonville's legislative agenda and asked if any of these items would benefit by being included on the city level. Mr. White said #1 & #2 on both the State and Federal lists.

Director Keogh suggested contacting other public agencies to coordinate legislative agendas and added that METRO's State and Federal legislative representatives are doing a great job.

16. CONSIDERATION OF PROVIDING ADDITIONAL SERVICE FOR FIRST NIGHT SANTA CRUZ ACTIVITIES

Summary:

Bryant Baehr reported that First Night Santa Cruz has requested that METRO provide additional service on December 31, 2004 for First Night activities at a lower level than last year and at METRO's cost. There are no funds available in METRO's budget to accommodate this request.

Discussion:

Last year, METRO provided 54.22 hours of additional service at a cost of \$3,253.20. Based on previous experience, staff would recommend this be the minimum level of service hours based on customer demand.

ACTION: MOTION: DIRECTOR ROTKIN SECOND: DIRECTOR TAVANTZIS

Deny the request from First Night Santa Cruz for additional fixed route service on December 31, 2004 at METRO's expense. Direct Staff to send a letter to First Night explaining that there are no funds in METRO's budget to accommodate this request and that if First Night can raise funds of \$3,253.20, the minimum level of additional service the District would provide would be the same as last year.

Vice Chair Keogh clarified that if First Night raises the funds, Staff is authorized to provide the service without having to return again to the Board.

Motion passed unanimously with Director Reilly being absent.

17. REVIEW OF ITEMS TO BE DISCUSSED IN CLOSED SESSION: District Counsel

Margaret Gallagher reported that the Board would discuss with their Legal Counsel the cases of Soretta Chatman and Fredy Castillo; 2 cases with the Labor Negotiator; 1 case of anticipated litigation; and that there would be no discussion regarding the case of Andre Hart.

18. ORAL AND WRITTEN COMMUNICATIONS REGARDING CLOSED SESSION

Bonnie Morr reported that she had received a copy of a letter to the IRS from Les White regarding the rollover of CalPERS 457 funds to purchase air time. Ms. Morr requested that the letter be faxed to Julia Philyaw at CalPERS.

Ms. Morr said that the deadline for the rollover is the end of December and requested a response as soon as possible regarding whether or not the District will allow the rollovers.

5-1.8

John Perez introduced himself as one of the employees facing the deadline and reiterated the request for a quick response.

SECTION II: CLOSED SESSION

Vice Chair Keogh adjourned to Closed Session at 10:21 a.m. and reconvened to Open Session at 11:15 a.m.

SECTION III: RECONVENE TO OPEN SESSION

19. REPORT OF CLOSED SESSION

Margaret Gallagher reported that the District will not allow the rollover of individual 457 funds to purchase additional air time until the IRS indicates it is legal and will not jeopardize METRO's 457 accounts.

ADJOURN

There being no further business, Vice Chair Keogh adjourned the meeting at 11:16 a.m.

Respectfully submitted,



CINDI THOMAS
Administrative Services Coordinator

5-1.9

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

Minutes- Board of Directors

December 17, 2004

A Regular Meeting of the Board of Directors of the Santa Cruz Metropolitan Transit District met on Friday, November 19, 2004 at the Santa Cruz City Council Chambers, 809 Center Street, Santa Cruz, CA.

Chair Reilly called the meeting to order at 9:05 a.m.

SECTION 1: OPEN SESSION

1. ROLL CALL:

DIRECTORS PRESENT

Sheryl Ainsworth
Jan Beautz
Michelle Hinkle
Mike Keogh
Dennis Norton
Emily Reilly
Mike Rotkin
Pat Spence
Mark Stone

DIRECTORS ABSENT

Marcela Tavantzis
Ex-Officio Wes Scott

STAFF PRESENT

Bryant Baehr, Operations Manager	Steve Paulson, ParaCruz Administrator
Frank Cheng, MetroBase Project Manager	Elisabeth Ross, Finance Manager
Mark Dorfman, Assistant General Manager	Robyn Slater, Human Resources Manager
Margaret Gallagher, District Counsel	Judy Souza, Base Superintendent
David Konno, Facilities Maint. Manager	Tom Stickel, Fleet Maintenance Manager

EMPLOYEES AND MEMBERS OF THE PUBLIC WHO VOLUNTARILY INDICATED THEY WERE PRESENT

Sheryl Ainsworth	Peter Prince, Bus Operator
Cheryl Brondstatter, Transit Supervisor	Will Regan, VMU
Joseph Florez, Bus Operator	Raymond Scargill, Parts & Materials Super
Gary Klemz, SEIU	Michael Smith, Custodial Svc. Worker I
Gilberto Limas, Bus Operator	Amy Weiss, Spanish Interpreter
Paul Marcelin-Sampson, Metro Riders Union	Bob Yount, MAC/MASTF/E&D TAC
Bonnie Morr, UTU	

5-1.10

2. ORAL AND WRITTEN COMMUNICATION

Written:

- | | | | |
|----|-------------------|-----|-----------------------|
| a. | Pat Clarke | Re: | Bus Operator Retiring |
| b. | Linda Wilshusen | Re: | Thank You Card |
| c. | Peter Katzlberger | Re: | ParaCruz Service |

Oral:

Chair Reilly introduced Director Dene Bustichi, who was appointed by the Scotts Valley City Council to replace Director Ainsworth. Chair Reilly announced that Director Tavantzis' father had passed away, which is why she is absent.

Director Rotkin announced that General Manager Les White was absent due to a health problem his wife has.

Both Director Rotkin and Chair Reilly asked to be copied on the staff response to Item #2-a.

3. LABOR ORGANIZATION COMMUNICATIONS

None.

4. ADDITIONAL DOCUMENTATION TO SUPPORT EXISTING AGENDA ITEMS

No questions or comments.

SECTION I: OPEN SESSION:

CONSENT AGENDA:

- | | |
|-------------------|--|
| ADD TO ITEM #5-3 | ACCEPT AND FILE NOVEMBER 2004 RIDERSHIP REPORT
(Insert Page 1 of the Ridership Report) |
| INSERT ITEM #5-6 | ACCEPT AND FILE THE MASTF COMMITTEE AGENDA FOR
DECEMBER 16, 2004 AND THE MINUTES OF NOVEMBER 18,
2004
(Insert Agenda and Minutes) |
| DELETE ITEM #5-9 | ACCEPT AND FILE HIGHWAY 17 STATUS REPORT FOR
OCTOBER 2004
(Will be included in the January 14, 2005 Board Packet) |
| INSERT ITEM #5-11 | ACCEPT AND FILE METROBASE STATUS REPORT
(Insert Staff Report) |
| ADD ITEM #5-15 | ACCEPT AND FILE NOTIFICATION OF ACTIONS TAKEN IN
CLOSED SESSION REGARDING THE SETTLEMENT WITH
BEVERLY BEAMS
(Insert Staff Report) |

5-1.11

REGULAR AGENDA:

- DELETE ITEM #8** CONSIDERATION OF AWARD OF CONTRACT FOR LONG TERM DISABILITY INSURANCE
(Action taken at the December 10, 2004 Board Meeting)
- INSERT ITEM #10** CONSIDERATION OF A RESOLUTION AMENDING FY 04-05 BUDGET
(Insert Staff Report)
- DELETE ITEM #15** RE-CONSIDERATION OF GRANTING A RIGHT OF WAY TO PG&E TO LOCATE A TRANSFORMER ON THE VIA DEL MAR PROJECT SITE, LOCATE PG&E LINES UNDERNEATH THE WATSONVILLE TRANSIT CENTER SIDEWALK AND ALLOW ACCESS TO THE TRANSFORMER VIA THE TRANSIT CENTER
(Action taken at the December 10, 2004 Board Meeting)
- DELETE ITEM #16** CONSIDERATION OF PROVIDING ADDITIONAL SERVICE FOR FIRST NIGHT SANTA CRUZ ACTIVITIES
(Action taken at the December 10, 2004 Board Meeting)
- ADD ITEM #17** CONSIDERATION OF A RESOLUTION AMENDING METRO'S BYLAWS RELATING TO THE NOMINATIONS AND ELECTIONS OF BOARD OFFICERS AND METRO REPRESENTATIVES TO THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION
(Insert Staff Report)

CONSENT AGENDA

- 5-1. APPROVE REGULAR BOARD MEETING MINUTES OF NOVEMBER 12 and NOVEMBER 19, 2004 AND SPECIAL MINUTES OF NOVEMBER 19, 2004
- 5-2. ACCEPT AND FILE PRELIMINARILY APPROVED CLAIMS
- 5-3. ACCEPT AND FILE NOVEMBER 2004 RIDERSHIP REPORT
- 5-4. CONSIDERATION OF TORT CLAIMS: NONE
- 5-5. ACCEPT AND FILE THE METRO ADVISORY COMMITTEE (MAC) AGENDA FOR DECEMBER 15, 2004 AND MINUTES OF OCTOBER 20, 2004
- 5-6. ACCEPT AND FILE THE MASTF COMMITTEE AGENDA FOR DECEMBER 16, 2004 AND THE MINUTES OF NOVEMBER 18, 2004
- 5-7. ACCEPT AND FILE MONTHLY BUDGET STATUS REPORT FOR OCTOBER 2004 AND APPROVAL OF BUDGET TRANSFERS
- 5-8. ACCEPT AND FILE PARACRUZ STATUS REPORT FOR SEPTEMBER 2004
- 5-9. DELETED: WILL BE INCLUDED IN THE JANUARY 14, 2005 BOARD PACKET
- 5-10. ACCEPT AND FILE UNIVERSITY OF CALIFORNIA, SANTA CRUZ SERVICE UPDATE
- 5-11. ACCEPT AND FILE METROBASE STATUS REPORT
- 5-12. ACCEPT AND FILE MINUTES REFLECTING VOTING RESULTS FROM APPOINTEES TO THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION FOR THE NOVEMBER MEETINGS
- 5-13. CONSIDERATION OF APPOINTMENT OF DENNIS PAPADOPULO TO THE METRO ADVISORY COMMITTEE (MAC) BY DIRECTOR SPENCE TO FILL VACANCY OF MICHAEL EDWARDS
- 5-14. CONSIDERATION OF REPORT ON APPOINTEE ATTENDANCE AT METRO ADVISORY COMMITTEE (MAC) MEETINGS

5-1.12

5-15. ACCEPT AND FILE NOTIFICATION OF ACTIONS TAKEN IN CLOSED SESSION REGARDING THE SETTLEMENT WITH BEVERLY BEAMS

ACTION: MOTION: DIRECTOR NORTON SECOND: DIRECTOR SKILLICORN

Approve the Consent Agenda.

Motion passed unanimously with Director Tavantzis being absent.

REGULAR AGENDA

Chair Reilly announced that she would take Item #17 before Item #12.

11. PRESENTATION OF EMPLOYEE LONGEVITY AWARDS

The following employees were awarded longevity certificates for their years of service:

TEN YEARS

Michael T. Smith, Custodial Service Worker I

TWENTY YEARS

Gilberto Limas, Bus Operator
Joseph A. Florez, Bus Operator
Raymond F. Scargill, Supervisor of Parts & Materials

TWENTY-FIVE YEARS

Cheryl L. Brondstatter, Transit Supervisor
Peter S. Prince, Bus Operator

CHAIR REILLY TOOK ITEM #11 OUT OF ORDER AT THIS TIME

11. CONSIDERATION OF A RESOLUTION OF APPRECIATION OF THE SERVICE OF SHERYL AINSWORTH AS A MEMBER OF THE BOARD OF DIRECTORS

Chair Reilly presented the Resolution of Appreciation to Sheryl Ainsworth

ACTION: MOTION: DIRECTOR ROTKIN SECOND: DIRECTOR BEAUTZ

Move passage of the Resolution of Appreciation for the services of Sheryl Ainsworth as a member of the Board of Directors.

Motion passed by unanimous affirmative voice vote in lieu of a roll call with Director Tavantzis being absent.

5-1.13

12. CONSIDERATION OF RECEIPT OF REPORT REGARDING THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION'S PARATRANSIT COORDINATION TASK FORCE (PCTF) AND FINAL MINUTES OF NOVEMBER 17, 2004

Director Spence reported she was unable to attend the December Task Force meeting and that she has become discouraged by the direction the PCTF has gone in the last 7 months and what seem to be personal attacks against the District. Director Spence feels the PCTF has been focusing on the transition of METRO providing ParaCruz service in-house, rather than working on the long-range goals that they were charged with.

Vice Chair Keogh stated that at its last meeting, the PCTF went over the matrix of ideas that will form the report to the RTC.

Chair Reilly stated she finds the meetings challenging with negative comments directed at District Staff, but also feels it is important for people to have the opportunity voice their opinions. She feels the PCTF has been productive and that there may be suggestions the District can say "Yes" to.

Director Beautz thanked Directors Spence, Reilly and Keogh for their time and effort representing the District at the Task Force meetings.

Director Rotkin reiterated that Supervisor Wormhoudt made it clear from the beginning that the purpose of the PCTF was to focus on long-term goals. He feels the Task Force is putting the public through another layer of beaurocracy because none of the minutes reflect any new ideas or how to reach goals. Director Rotkin feels the Task Force needs to change its focus and address the long-range issues it was charged with.

Tegan Speiser reported that the matrix mentioned earlier is made up of all the ideas the PCTF has come up with so far. There are preliminary recommendations that were developed at the November meeting. Ms. Speiser reported there would be two more meetings where the discussions will be concluded and recommendations made, which will then be finalized and forwarded to the RTC and METRO Board in the spring. Ms. Speiser offered to email the matrix to Staff to be forwarded to the Board.

Paul Marcelin-Sampson echoed what Directors Spence and Rotkin stated and also said it would be really nice for the District to be able to say "Yes" to special requests, but that the Task Force is asking for exceptions that would serve very few people.

ACTION: MOTION: DIRECTOR ROTKIN SECOND: DIRECTOR REILLY

Accept the report of the Paratransit Coordination Task Force and final minutes of the November 17, 2004 meeting.

Motion passed unanimously with Director Tavantzis being absent.

5-1.14

9. CONSIDERATION OF PARACRUZ OPERATIONS STATUS REPORT

Bryant Baehr said the Board would begin to see Staff Reports in the Board Packets next month. He and Steve Paulson gave a PowerPoint presentation and reported on what will be happening next including another face-to-face outreach with the dispatchers and the top 30 trip generators; focus on education and training; complete the eligibility facility enhancement; analyze post-trip data to optimize on-time performance, productivity and schedule efficiency. Staff will return to the Board with productivity numbers and recommendations for providing service measures.

Vice Chair Keogh stated that he would like to see future Staff Reports include answers to questions Staff ask of themselves including the speed of the Trapeze system, what the optimal speed is, etc. Mr. Baehr replied that the first report would include several items the Board can choose from to be included in future reports.

Paul Marcelin-Sampson congratulated ParaCruz employees, reported that he has heard very positive feedback from ParaCruz customers, and suggested doing the "Living the Paratransit Experience" again.

Bryant Baehr explained what "Living the Paratransit Experience" was and offered to arrange a tour and a ride-along for Director Skillicorn.

10. CONSIDERATION OF A RESOLUTION AMENDING FY 04-05 BUDGET

Elisabeth Ross reported that the amendment includes, among other things, a reallocation of Highway 17 revenue and a transfer of \$81,500 of the FTA operating assistance advance to the capital budget for one-time ParaCruz expenses. This reduction in operating revenues is completely offset by a reduction in ParaCruz operating expenses. The proposed revision to the staffing table for the Customer Service Department would allow the immediate callback of a laid off Customer Service Representative.

ACTION: MOTION: DIRECTOR ROTKIN SECOND: DIRECTOR REILLY

Move passage of the Resolution revising the FY 04-05 budget in accordance with Exhibit A, and authorize the revision to the staffing table in the Customer Service Department to reflect combining three (3) positions for Senior Customer Service Representative/Customer Service Representative.

Motion passed by affirmative roll call vote with Director Bustichi abstaining and Director Tavantzis being absent.

17. CONSIDERATION OF A RESOLUTION AMENDING METRO'S BYLAWS RELATING TO THE NOMINATIONS AND ELECTIONS OF BOARD OFFICERS AND METRO REPRESENTATIVES TO THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION

5-1.15

Summary:

Margaret Gallagher reported that the recommended amendments include the language that the Board is considering changing relating to nominations and elections of Board Officers and METRO representatives to the SCCRTC. Ms. Gallagher explained this would allow nominations to remain open up until the actual vote at the 2nd January meeting and that new officers would take over the 2nd January meeting immediately after the vote, which would be right after roll call.

Director Beautz suggested the following motion:

ACTION: MOTION: DIRECTOR BEAUTZ SECOND: DIRECTOR ROTKIN

Move passage of the Resolution amending METRO's Bylaws as specified in the attachment relating to nominations and elections of Board Officers and METRO Representatives to the Santa Cruz County Regional transportation Commission with the following language:

1. Add to the beginning of section 6.01(a) "The Directors shall at its 1st meeting in January nominate members.." and,
2. Adding to section 14.02(a) nominations may be received until final selection occur to match the language in section 6.01(a).

Discussion:

Director Rotkin proposed and Director Beautz did not accept amending the motion to include the language to say following January 1st rather than "at it's 1st meeting in January".

Director Stone suggested having parallel procedures for both the Board Officer and RTC elections and removing the last sentence of section 14.02 (a).

There was a discussion about the nomination process of the RTC representatives.

Vice Chair Keogh suggested the following additional motion separately:

Clarify section 6.01(b) with the following language: In the permanent absence of the Chair, the Vice Chair shall assume that position for the remainder of the term and the Board of Directors shall replace the Vice Chair position.

Director Beautz asked that the motions be voted on separately and restated her original motion:

ACTION: MOTION: DIRECTOR BEAUTZ SECOND: DIRECTOR ROTKIN

Move passage of the Resolution amending METRO's Bylaws as specified in the attachment relating to nominations and elections of Board Officers and METRO Representatives to the Santa Cruz County Regional transportation Commission with the following language:

1. Add to the beginning of section 6.01(a) where "in December" is crossed out, "The Directors shall at its 1st meeting in January nominate members.." and,

5-1.16

2. Adding to section 14.02(a) after the sentence “At that first meeting in January, the Chair shall entertain other motions for SCCRTC representatives and alternates from the Directors.” Add “Nominations may be received until final selections occur” to match the language in section 6.01(a), and,
3. Remove the last sentence of section 14.02(a).

Director Norton requested separating section 14.02 and section 6.01 into two separate motions. Chair Reilly agreed and asked for a vote on only the 1st part of the motion.

Part 1 of the motion regarding section 6.01 passed by unanimous affirmative voice vote in lieu of a roll call vote with Director Tavantzis being absent.

Chair Reilly asked for a vote on part 2 and 3 of the motion regarding section 14.02.

Director Norton stated that Directors on the METRO Board represent approximately 5% of the population of people who use METRO and when a Director is a METRO representative on the SCCRTC, they represent 100% of the community and all forms of transportation, not just the Transit District. Director Norton voiced his opinion that the Bylaws should reflect that at least 2 of the 3 METRO representatives appointed to the RTC be elected people.

Director Beautz disagreed and stated it is very discriminatory and should not be included in the Bylaws that someone should have to be an elected person to be appointed to the RTC. She added that citizen representatives make excellent RTC members and should have the opportunity to be appointed.

Director Rotkin asked that this issue be tabled and does not want the vote to reflect that he supports the concept of double appointments as insulation from public recall.

Director Spence stated that she feels the 3 at-large appointments from the Board of Supervisors on the District Board represent the whole county including the cities and feel a great responsibility to the whole community and do not have the same pressures elected officials have.

Parts 2 and 3 of the motion regarding section 14.02 passed by unanimous affirmative voice vote in lieu of a roll call vote with Director Tavantzis being absent.

Vice Chair Keogh restated his motion:

ACTION: MOTION: DIRECTOR KEOGH SECOND: DIRECTOR ROTKIN

Move passage of the Resolution amending METRO’s Bylaws as specified in the attachment relating to nominations and elections of Board Officers and METRO Representatives to the Santa Cruz County Regional transportation Commission with the following clarifying language amending section 6.01(b): Should the office of the Chair become vacant during the calendar year, the Vice Chair shall assume the office of the Chair. Should the office of the Vice Chair become vacant, the nomination and selection of Vice Chair shall be agendized and acted upon by the Board of Directors.

5-1.17

Motion passed by unanimous affirmative voice vote in lieu of a roll call vote with Director Tavantzis being absent.

12. CONSIDERATION OF NOMINATION OF DIRECTORS TO SERVE AS BOARD OFFICERS FOR 2005, MAKING AN APPOINTMENT TO THE HIGHWAY 1 CONSTRUCTION AUTHORITY AND REVIEWING THE PROCESS FOR THE SELECTION OF APPOINTMENTS TO THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION FOR 2005

ACTION: MOTION: DIRECTOR ROTKIN SECOND: DIRECTOR BEUATZ

Table this item until next month.

Motion passed unanimously with Director Tavantzis being absent.

13. CONSIDERATION OF APPROVAL OF 2005 STATE LEGISLATIVE PROGRAM

Mark Dorfman reported that the goals on page 13.a1 are what staff is proposing to put forward for the State Legislative Program. The first item, protecting existing funding sources and funding levels for transit operating assistance and capital assistance is the most critical. Mr. Dorfman distributed a Prop 42 brochure developed by the CTC, which is attached to these minutes. Mr. Dorfman pointed out that on page 6 of the brochure it states that the Highway 17 / Route 1 Merge Lanes and the MetroBase Project are 2 key projects that would be impacted if Prop 42 funds are again diverted. Mr. Dorfman then went over the remainder of the list.

ACTION: MOTION: DIRECTOR ROTKIN SECOND: DIRECTOR REILLY

Adopt the proposed METRO 2005 State Legislative Program as submitted by Staff.

Discussion:

Director Rotkin pointed out that this could educate the public on METRO's relationship with the state. He stated that every local public survey in the past 10 years showed that traffic congestion is the biggest complaint. In 2002, California voters approved Prop 42 by almost 70%, redirecting the state's portion sales tax on gasoline from the General Fund to transportation programs. Since then, the state has diverted 90% of these funds expected to go towards transportation completely inappropriately. Director Rotkin wants to send a very strong message to our legislators that the state is stealing money from Prop 42 funds, which is not acceptable, and that these funds need to go towards transportation as the voters intended.

Director Beutz warned that voters need to watch emergency escape clauses, as Prop 42 has, that allows the state to divert funds. Director Beutz believes it should say in the proposition that these funds cannot be diverted for any reason.

Direction from Chair Reilly: Staff to contact local cities and the county and support any transit related issues included in their legislative programs.

5-1.18

Mark Dorfman clarified for Director Spence that the purpose of the Legislative program is to give marching orders to our lobbyist so that when things come up, we can react as opposed to bringing them back for revision. By having item #2 in there, if any funding program or legislation that comes onto the horizon, our legislative representative in Sacramento can quickly throw in a letter of support or sign on for us to a bill that meets these requirements.

Motion passed unanimously with Director Tavantzis being absent.

14. CONSIDERATION OF APPROVAL OF 2005 FEDERAL LEGISLATIVE PROGRAM

Mark Dorfman reported that the goals on page 14.a1 are what staff is proposing to put forward for the Federal Legislative Program. The first item is to protect funding we have in the TEA-21 Act and to resist efforts by states trying to reduce those funds based on equity consideration. Mr. Dorfman said the inclusion of the Incentive Tier in the Federal Transit Formula Program in the Reauthorization of TEA-21 is critical and then went over the remainder of the list.

ACTION: MOTION: DIRECTOR ROTKIN SECOND: DIRECTOR REILLY

Adopt the proposed METRO 2005 Federal Legislative Program as submitted by Staff.

Motion passed unanimously with Director Tavantzis being absent.

18. REVIEW OF ITEMS TO BE DISCUSSED IN CLOSED SESSION: District Counsel

Margaret Gallagher reported that Board will be discussing 3 potential litigation cases and that the Board is being asked to add the case of SCMTD v. Yvonne Aiassa Humphrey; Surf City Produce Company, Inc. et seq, and the claim of Kathy Biondi to today's Closed Session agenda because they came to the attention of Staff after the posting of the regular agenda and there is a need to take immediate action before to the next regular Board meeting.

ACTION: MOTION: DIRECTOR ROTKIN SECOND: DIRECTOR BEAUTZ

Make the necessary findings to add the case of SCMTD v. Yvonne Humphrey and the Worker's Compensation claim of Kathy Biondi to today's Closed Session agenda.

Motion passed unanimously with Director Tavantzis being absent.

SECTION II: CLOSED SESSION

Chair Reilly adjourned to Closed Session at 10:57 a.m. and reconvened to Open Session at 12:00 p.m.

5-1.19

SECTION III: RECONVENE TO OPEN SESSION

13. REPORT OF CLOSED SESSION

Margaret Gallagher had nothing to report at this time.

ADJOURN

There being no further business, Chair Reilly adjourned the meeting at 12:00 p.m.

Respectfully submitted,



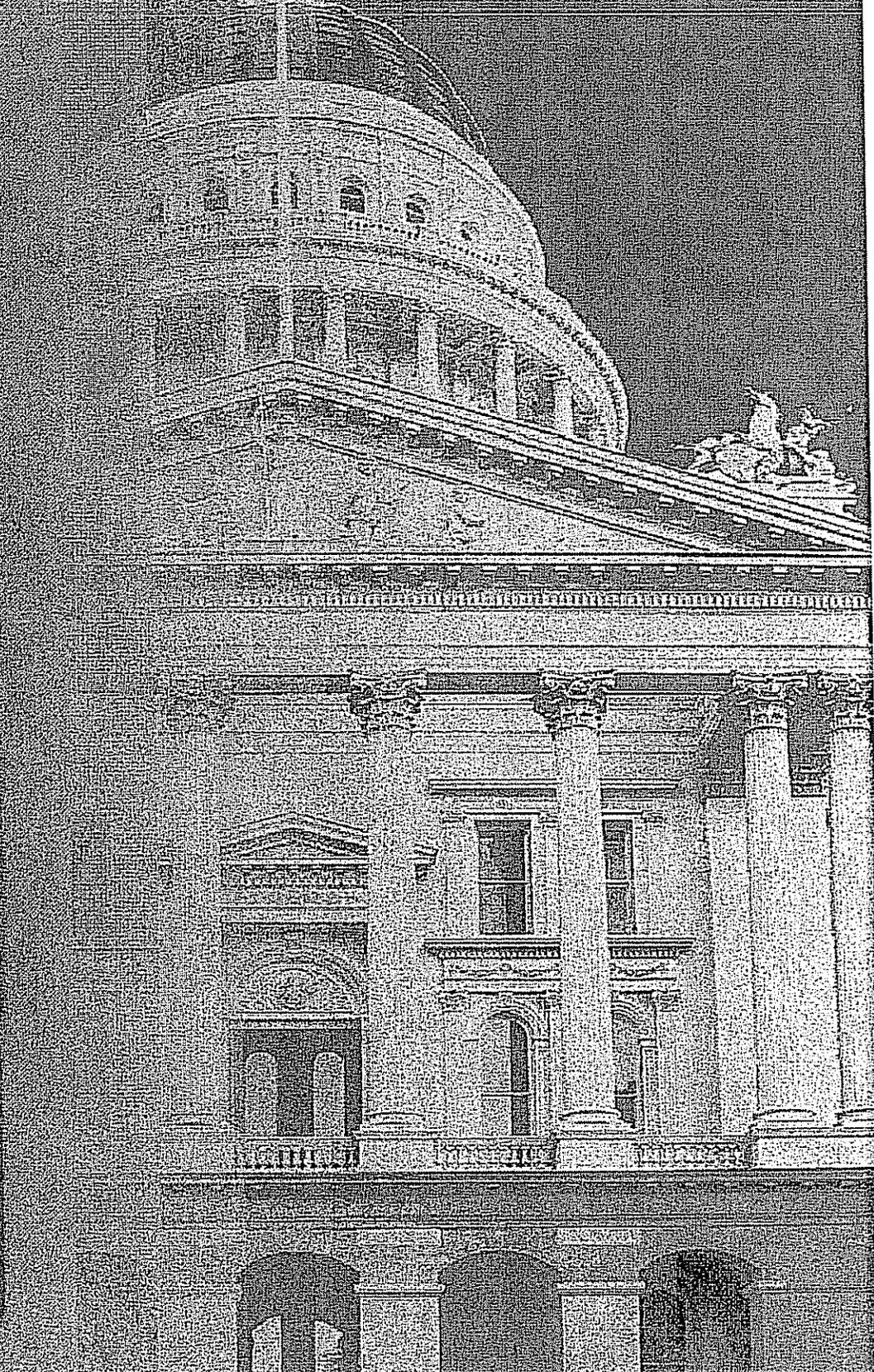
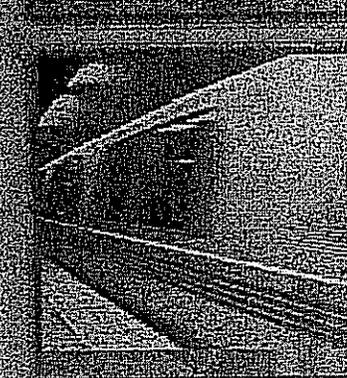
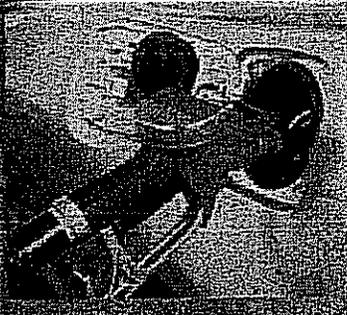
CINDI THOMAS
Administrative Services Coordinator

DRAFT

5-1.20

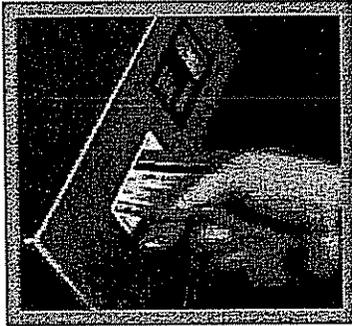
RUNNING ON EMPTY:

The Importance of Proposition 42 to California's Transportation Infrastructure



5-1-21

BRIEF HISTORY OF LOST TRANSPORTATION FUNDS



Once again the State of California is facing tremendous fiscal difficulties with a projected \$8-\$10 billion deficit in FY 05-06. The challenges associated with fixing the deficit are both near-term-- with actions needed in the current and upcoming budget years--and long-term, with ongoing structural causes that need permanent solutions.

As lawmakers once again consider balancing the state budget with diversions of transportation revenues and cuts to transportation programs, the Save Proposition 42 Coalition, a public-private partnership of transportation stakeholders, has come together to inform decision makers of the critical contributions the transportation industry makes to the state's competitive advantage. Funding critical transportation infrastructure projects stimulates the economy, creates jobs, moves goods, improves air quality and enhances our quality of life for all Californians. The Save Proposition 42 Coalition-- comprised of representatives from business, labor and transportation agencies--is seeking permanent protection of Proposition 42 funds.

With Proposition 42 funds expected to account for about 75% of funding for the State Transportation Improvement Program in future years, on-going raids will likely play an increasing role in slowing the state's recovery.

THE FACTS

BRIEF HISTORY OF LOST PROPOSITION 42 TRANSPORTATION FUNDS

In 2002, California voters approved Proposition 42 by almost a 70% margin, redirecting the state's portion sales tax on gasoline from the General Fund to transportation programs. Approximately \$1.1 billion in Proposition 42 funds annually were supposed to start flowing in FY 2003-04. **Out of the \$2.4 billion expected from Proposition 42 for FY 2003-04 and FY 2004-05, only \$295 million has flowed to transportation projects.** The Governor has made it clear that due to the FY 2005-06 deficit, channeling Proposition 42 funds from transportation to the General Fund is once again a distinct possibility.

PROPOSITION 42 SUSPENSIONS, TRANSFERS AND LOANS TO THE GENERAL FUND			
Year	Amount Expected	Amount Received	Amount Loaned to General Fund
2003-2004	\$1.157 billion	\$295 million	\$862 million
2004-2005	\$1.207 billion	\$0	\$1.207 billion

Source: Legislative Analyst's Office

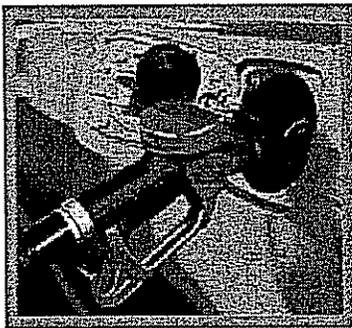
5-1.22

In addition to the \$2.4 billion, another \$3.1 billion has been diverted from transportation to the General Fund in the same time period as shown in the table below:

AVAILABLE TRANSPORTATION FUNDS V. ACTUALLY AUTHORIZED TRANSPORTATION FUNDS						
	FY 00-01	FY 01-02	FY 02-03	FY 03-04	FY 04-05	SUM
ANNUALIZED UNFUNDED NEED	\$11.3	\$11.5	\$11.7	\$12.0	\$12.5	\$59
TOTAL TRANSPORTATION FUNDS AS AVAILABLE (PRIOR TO TRANSFERS, LOANS OR DIVERSIONS)*	\$3.8	\$3.8	\$4.5	\$4.6	\$4.6	\$21.3
TOTAL TRANSPORTATION FUNDS AS ACTUALLY AUTHORIZED**	\$3.5	\$4.1	\$3.3	\$2.8	\$2.1	\$15.8
TOTAL TRANSPORTATION FUNDS LOST	\$0.3	-\$0.3	\$1.2	-\$1.8	-\$2.5	\$5.5

*INCLUDES \$1.1 BIL. IN PROPOSITION 42 FUNDS ANNUALLY STARTING IN FY 03-04 ** FY 03-04 AND FY 04-05 ESTIMATED (SOURCE: CTC TRANSPORTATION REPORT DATED JULY 26, 2004)

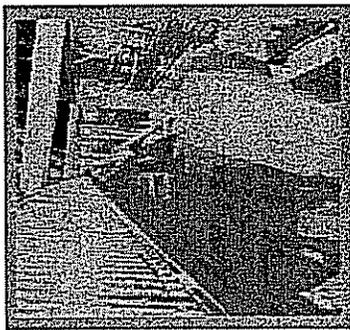
DIRE STRAITS FOR CURRENT TRANSPORTATION FUNDING FLOW



The combination of eliminated Proposition 42 funds and slower than expected federal transportation funds coming to California has resulted in such a severe cash flow crunch that **no new project allocations have been approved since December 2002**. Only priority emergency and rehabilitation programs have been funded. With barely enough cash to sustain \$500 million in projects through December 2004, the California Transportation Commission expects to continue its moratorium on new project allocations from the State Transportation Improvement Program and the Traffic Congestion Relief Program. Additionally, the Commission will not be able to issue any new GARVEE bonds, which have proved to be an innovative way to advance funding.

Transportation funding has been cut to the quick. Now, even the quick may have to be cut. Without an infusion, the Commission may be forced to stop state highway rehabilitation project allocations. With more than 50% of California roads already in fair or poor condition, more deferrals of Proposition 42 funds for General Fund purposes continue to put Californians--especially emergency personnel--in harm's way as they attempt to navigate through a congested and deteriorating road system.

PROMISED RELIEF IN PRECARIOUS POSITION



Even though some funds earmarked for transportation could flow as a result of the Governor's negotiated gaming compact, federal ethanol funds returning to California and the passage of a federal transportation reauthorization bill expected next year, **all of these sources are now expected to provide less funding than anticipated** during enactment of the FY 04-05 budget. Specifically, the \$1.2 billion from tribal gaming bonds is now estimated to generate only \$850 million. The ethanol fix, which will return \$300 million to California annually through 2010 won't begin to flow for two more years. Finally, the much anticipated increase in federal transportation funding remains on hold pending approval of a new federal transportation

Indian gaming compacts are now expected to generate only \$850 million -- a loss of 30% of expected transportation revenues.

program to replace the Transportation Equity Act for the 21st Century (TEA 21), which expired more than a year ago. As a consequence, the transportation funding hole continues to deepen.

THE CONSEQUENCES

Failure to increase investment in transportation will further delay the state's economic recovery, reduce employment growth, and limit access to employment, education, recreation, and social services. Consider the following:

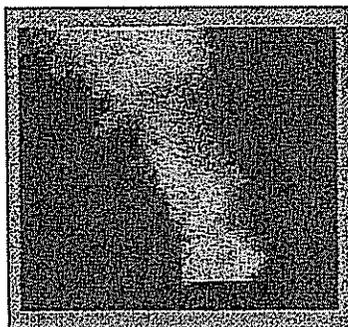
The so-called Golden State's chronic underinvestment in infrastructure is documented in the table below. California currently ranks 47th of 50 states in both per-capita and income-based spending on highways. In fact, our poor investment in highways today indicates we are essentially no better off than we were in 1998. Worse yet, of all major categories of infrastructure in California, transportation ranks lowest on average. This neglect only detracts from our competitiveness, which is particularly troubling at a time when the Governor is traveling abroad to attract foreign investment to our state.

42,000 jobs could have been created if Proposition 42 funds had not been raided over the past two years.

California's Public Investment Priorities in a National Context				
	California's 50 State Ranking			
	Per Capita Basis		Personal Income Basis	
	2004	1998	2004	1998
Highways	47th	48th	47th	48th
Higher Education	49th	37th	49th	41st
Public Schools	10th	31st	17th	38th
Solid Waste Management	25th	14th	29th	19th
Corrections	21st	8th	24th	8th
Sewage	25th	3rd	27th	3rd
Overall Infrastructure Investment	40th	26th	44th	40th

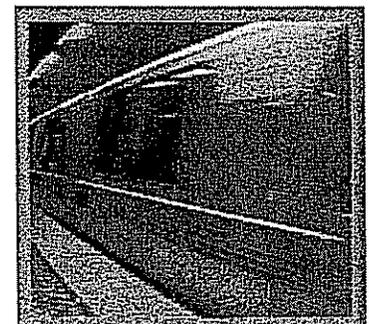
The Saer Group Source: US Census for population data; US Bureau of Economic Analysis for investment data

EMPLOYMENT GROWTH AND WORLD TRADE IMPERILED



According to the California Business Roundtable, every \$1 billion of investment in transportation in California creates approximately 20,000 jobs. Many of these jobs are high-paying, especially in the growing logistics industry which offers better salaries than the shrinking manufacturing industry. Diversion of \$2.1 billion in Proposition 42 funds caused the state to forego approximately 42,000 jobs that would have contributed tax revenue to the State's General Fund. Given the total \$5.5 billion in diverted transportation funds to date, the state has lost the opportunity to create approximately 110,000 new jobs.

Investing in transportation helps move goods more efficiently. California is the world's sixth largest economy which is largely due to our international trade activity. In fact, the value of international goods coming through our air and water ports is estimated to be \$350 billion this year – an increase of 17% over last year. To maintain this competitive position, we must invest in infrastructure to avoid losing jobs and increasing congestion. The following alarming statistic underscores this point: starting in 2006, 28,000 good paying trade jobs will be at risk annually as a result of gridlock caused by Los Angeles area trade activity, centered at ports and on rail corridors.



5-1.24

BUDGET CUTS WORSEN AIR QUALITY AND RISK HUMAN HEALTH

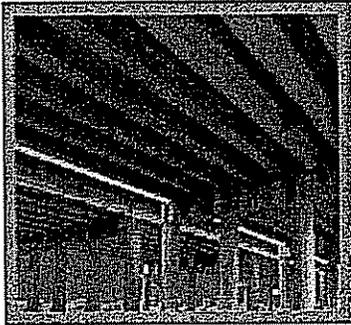


Transportation funding and air quality conformity go hand-in-hand, especially in large metropolitan areas including the Bay Area, Sacramento and Southern California. While air pollution has noticeably improved in the last 20 years, these regions are still classified as a “non-attainment” areas, meaning that levels of certain air pollutants still exceed federal standards. The Journal of the American Medical Association recently published a landmark new study linking exposure to ozone (a precursor to smog) to a significant increase in premature death in cities across the nation. The study found that increasing levels of this air pollutant could be linked to thousands of premature deaths annually.

More than 50% of California roads are in fair or poor condition. Investing in repaving is critical since reconstructing roads costs approximately 5 times more than resurfacing a road.

Reducing or eliminating Proposition 42 funding jeopardizes metropolitan regions’ ability to institute federally mandated Transportation Control Measures within required timeframes. As a result, traffic could slow to a halt, vehicle emissions will increase, and our major metropolitan areas may experience a conformity lapse within the next two years. The penalty for such a lapse could limit these regions’ ability to implement transportation projects programmed in the currently approved Regional Transportation Improvement Program (RTIP), valued at approximately \$30.5 billion in combined federal, state and local funding.

BUDGET CUTS THREATEN FUTURE FEDERAL FUNDS



Next year is a critical year for the surface transportation community because this likely is the year that Congress will finally reauthorize TEA-21. The next reauthorization bill will determine the programs, policies, and funding for the nation’s transportation systems for the next six years. With the new act comes new matching requirements for state and local regions. TEA-21 legislation, which Congress is expected to adopt by mid-2005 includes higher local matching shares than previously approved federal transportation programs - up to 50 percent for some programs.

The Journal of the American Medical Association recently published a landmark new study linking exposure to ozone (a precursor to smog) to a significant increase in premature death in cities across the nation.

Local and regional transportation entities cannot carry the full weight of matching federal transportation funds. Voters in many communities have already increased funding for local surface transportation projects to supplement state and federal funding. California must position itself to commit its full state match, carry its financial share by dedicating to transportation all existing revenue sources (both gas taxes and sales taxes on gasoline) in order to best leverage more federal funds for surface transportation projects.

RECOMMENDATIONS

California’s budget crisis will not be resolved without some sacrifice in programs across the state and/or an increase in revenue. However, transportation has already made deep sacrifices for the past two years when Proposition 42 suspensions, transfers and loans to the General Fund programs have provided a safety valve for other state priorities. Further cuts in transportation programs will harm California economy’s growth and resultant growth in general fund revenues. As the Governor develops his FY 05-06 Budget scheduled for release in early January, we urge the Administration and Legislature to resist further suspensions or loans of Proposition 42 funds or any other transportation money to the General Fund for a third consecutive year. Immediate transportation infrastructure investments are necessary to ensure we not only reclaim our moniker as the Golden State, but that we elevate that nickname to “the Golden Dream by the Sea” as proffered by Governor Schwarzenegger.

APPENDIX OF PROJECTS AT RISK FOR DELAY AND ADDITIONAL COST OR ELIMINATION

Special Note: Transportation projects by their very nature tend to take longer than the one year fiscal year (FY 05-06) discussed in this document. Nonetheless, the Governor's proposed cuts to transportation put at risk major short and long-term projects included in the current State Transportation Implementation Program (STIP) and Traffic Congestion Relief Program (TCRP). Proposition 42 funds are used support these programs. Attached is a partial list of STIP projects at risk. The current STIP is scheduled to expire in FY 06-07. The TCRP is currently scheduled to expire in FY 07-08.

PRIORITY PROJECTS AT RISK FOR LOSING STATE TRANSPORTATION IMPROVEMENT PROGRAM FUNDING (PARTIAL LIST) IN MILLIONS

County	Project Name	STIP Dollars at Risk	Total Project Cost	Senator	Assemblymember	
Alameda	BART Oakland Airport Connector	\$33.0	\$233.0	Perata	Chan	
	I 880 Mission HOV Lane	\$36.8	\$134.5	Figueroa	Torrico	
	I 238 Widening	\$28.2	\$125.1	Figueroa	Kiehs	
Alameda/Santa Clara	I 680 Signal Grade HOV Lane - Milpitas to SR 84	\$62.4	\$166.8	Figueroa	Kiehs and Torrico	
	SR 88 Pine Grove Passing Lane	\$6.4	\$6.4	Cox	Hokanishi and Cogdill	
Alpine, Amador, Calaveras	SR 4 Angels Camp Bypass	\$7.6	\$31.4	Cox	Hokanishi and Cogdill	
	SR 149 Widening - SR 99 to SR 70	\$64.6	\$64.6	Amestad	Keene	
Butte	SR 70 Orphir Rd Widening	\$25.7	\$25.7	Amestad	Keene	
	SR 99 Auxiliary Lane	\$24.7	\$24.7	Amestad	Keene	
	I 80 West Bound HOV - Rt 4 to Carquinez	\$28.9	\$29.8	Torlatson	Condamilla	
Contra Costa	I 680 Bollinger Cyn and Sycamore Aux Lane	\$ 8.9	\$23.0	Torlatson	Houston	
	Richmond Intermodal Station Parking Structure	\$ 2.0	\$16.2	Perata	Hancock	
	SR 4 Liveridge to Somersville	\$30.0	\$75.0	Torlatson	Condamilla	
	Fred Haight Drive Reconstruction	\$0.6	\$0.6	Amestad	Berg	
Del Norte	A Street Rehabilitation	\$0.2	\$0.2	Amestad	Berg	
	Westside Pkwy Widening - in Bakersfield	\$170.0	\$170.0	Ashburn	McCarthy	
Kern	Rt 46 Widening - SLO County Line to Kocks Corner	\$18.0	\$18.0	Florez	Parra and Blakeslee	
	Rt 14 Widening near Mojave	\$60.0	\$60.0	Ashburn	Maze	
Kings	SR 198 Improvements - Hanford to Visalia	\$17.5	\$77.0	Florez	Parra	
	KART Transfer Facility Construction	\$0.4	\$0.4	Florez	Parra	
Lake	Overlay and Reconstruction Projects (various)	\$7.0	\$7.6	Florez	Parra	
	Soda Bay Rd Rehabilitation	\$1.8	\$1.9	Chesbro	Berg	
Lassen	South Main St Rehabilitation	\$1.5	\$1.6	Chesbro	Berg	
	Susanville Town Hill Safety and Ops Improvement	\$5.3	\$5.3	Cox	Keene	
Los Angeles	Expo L1 Rail to Santa Monica	\$332 million in Special Note: \$332 million in Los Angeles County funding will be delayed if Prop 42 transfer is suspended. Local MTA funding can be made available to assist in meeting funding priorities of key projects.	\$597.7			
	Gresham Corridor Transitway	\$346.1	\$346.1			
	San Fernando Valley N-S (Phases II-IV)	\$789.3	\$789.3			
	I 405 Northbound Carpool Lanes from I 10 to US 101	\$1497.0	\$1497.0			
	I 10 Carpool Lanes from Puente to Ultras Aves	\$112.9	\$112.9			
	I 5 Carpool and Mixed Flow Lanes from I 605-I 710	\$1415.0	\$1415.0			
	I 10 Carpool Lanes from Citrus Av to SR 57	\$112.4	\$112.4			
	I 405/US 101 (North and Southbound) Connector	\$118.0	\$118.0			
	SR 71 Carpool Lanes and Upgrade from I 10 to Mission Bl.	\$179.8	\$179.8			
	Additional Call for Project Grants Countywide	\$400.0	\$400.0			
	SR 99-SR 145/Gateway Drive Interchange and Overcrossing Improvements	\$5.1	\$8.5	Denham	Cogdill	
	Marin	US 101 HOV Gap Closure	\$37.2	\$62.2	Migden	Notion
		Willits Bypass	\$56.5	\$139.4	Chesbro	Berg
	Mendocino	Asphalt Rd Rehabilitation (Various)	\$3.6	\$3.7		
		Mission Interchange	\$47.3	\$66.7	Denham	Matthews
Merced	SR 140 Bradley Overhead Widening	\$19.8	\$45.9	Denham	Matthews	
	Warner Street from Park St to 12th St Improvement	\$2.0	\$2.0	Cox	Lo Mollo	
Modoc	Bth St from W. C. St to East St. Improvement	\$1.9	\$1.9	Cox	Lo Mollo	
	Lundy Lake Rd Improvements	\$1.3	\$1.4	Cox	Cogdill	
Mono	Meridian Reconstruction	\$2.5	\$2.5	Cox	Cogdill	
	Independence SR 395 Improvements	\$1.5	\$1.5	Ashburn	Maze	
Monterey	US 101 Prunedale Improvement	\$66.0	\$224.6	Maldonado	Laird	
	SR 68 Safety and Operational Improvements	\$4.6	\$6.8	Maldonado	Laird	
	Carmel Rt 1 Truck Climbing Lane Extension	\$3.1	\$3.1	Maldonado	Laird	
Napa	SR 12 Jameson Cyn Rd Widening	\$4.0	\$9.4	Chesbro	Evans	
	SR 20 Dorsey Dr Interchange Improvements	\$16.9	\$18.4	Amestad	Keene	
Nevada	SR 49 Widening from Wolf/Camie Rd to Grass Valley	\$18.2	\$18.2	Amestad	Keene	
	Rt 49 Capacity and Op Improvements/Auburn New Local Rd	\$8.4	\$14.6	Cox	Leslie	
Placer	I 80/Sierra College Blvd Interchange Improvements	\$18.4	\$27.3	Cox	Leslie	
	A23 Road Rehabilitation	\$1.6	\$1.6	Cox	Keene	
Plumas	A15 Road Reconstruction	\$1.3	\$1.3	Cox	Keene	
	I 5 - Far North HOV and Widening	\$59.5	\$205.0	Dunn	Bermudez and Daucher	
Orange	Imperial Hwy Grade Separation	\$57.0	\$58.8	Margett	Huff and Daucher	
	On/Trac/Pleasantia Grade Separations	\$3.3	\$15.1	Margett	Daucher	
Riverside	SR 60 HOV/Mixed Flow	\$13.0	\$42.0	Dutton	Haynes and Spitzer	
	SR 91 Green River Interchange	\$19.5	\$25.5	Battin	Spitzer	
	SR 91 HOV - Adams to SR 6/SR 91/SR 215	\$13.1	\$197.1	Dutton	Benoit	
Sacramento	Greenback Lane Improvements - Auburn to Dewey	\$9.1	\$9.1	Ortiz	Milla	
	Light Rail Extension	\$74.3	\$185.5	Ortiz	Jones	
San Bernardino	Interstate 215 Widening (North of I-10)	\$140.0	\$382.0	Soto	Roca	
	Interstate 10 Widening	\$15.3	\$35.0	Dutton	Emmerson	
San Diego	I 15 Managed Lanes and Bus Rapid Transit System	\$238.0	\$375.0	Hollingsworth, Morrow and Kehoe	Wyland, Plescio, La Seur	
	Mid-Coast Light Rail Oldtown to Balboa	\$9.3	\$131.6	Kehoe	Saldana	
San Francisco	SR 52	\$170.4	\$350.0	Hollingsworth	La Seur	
	SF Muni 3rd Street Light Rail	\$2.6	\$117.6	Migden and Speier	Yee, Leno, Mullin	
San Joaquin	I 205 Improvements	\$67.0	\$92.0	Niello and Hancock	Houston and Matthews	
	SR 99 Improvements	\$35.2	\$74.0	Niello	Aghazarian	
San Luis Obispo	Highway 101/Price Street Extension in Pismo Beach	\$15.2	\$18.0	Maldonado	Houston	
	Highway 101/41 Interchange Improvement in Alexander	\$17.0	\$17.2	Maldonado	Houston	
San Mateo	Calhoun Grade Separation - Tilton & Poplar	\$9.1	\$36.0	Speier	Mullin	
	US 101 Aux Lanes - 3rd to Millbrae	\$42.9	\$159.9	Speier	Mullin	
Santa Clara	SR 152/156 Interchange Improvements	\$9.2	\$25.4	Alquist	Solanes	

APPENDIX OF DEFERRED ROAD PAVEMENT AND MAINTENANCE PROGRAMS

DUE TO FUNDING SHORTFALLS Special Note: The following table contains information collected in November 2004, which provides a snapshot of the condition and existing shortfall of the county (unincorporated area only) road system.

It should be noted that this spreadsheet reflects pavement rehabilitation and maintenance needs only. This does not include safety, operations, drainage, NPDES, sidewalks or non-pavement needs. This does not include any traffic enhancement or capacity needs with the exception of Los Angeles County needs, which includes their traffic congestion needs.

The results show that with 38 counties reporting on repaving cycles (that should occur every 18 to 20 years) only 2 are within that range.

SUMMARY SNAPSHOT OF COUNTY REPAVING AND MAINTENANCE NEEDS AT LEAST \$1 BILLION IN DEFERRED NEED*

County	Current Repaving Cycle (Cycle should be 18-20 years)	Percentage of Roads in Fair to Very Poor Condition	Annual Revenues available for Pavement Management (In Millions)	Annual Need (In Millions)	Gap or Shortfall (In Millions)	Existing Backlog (In Millions)
Alameda	50 years		\$5.6	\$6.3	\$0.7	\$28.6
Amador	51 years		\$0.6	\$2.5	\$2.0	\$30.0
Butte	100 years	60%	\$10.2	\$15.4	\$5.2	\$80.0
Calaveras	100 years		\$0.5	\$2.0	\$1.5	\$65.0
Contra Costa		22%	\$6.8	\$15.2	\$8.9	\$21.0
Fresno	20 years	18%	\$17.3	\$27.3	\$10.0	\$135.0
Humboldt	Infinite					
Imperial	50 years					
Kern			\$10.0	\$35.0	\$25.0	\$300.0
*Kings	125 years	75%	\$3.6	\$6.0	\$2.4	\$100.0
Lake	Infinite	81%	\$3.4	\$7.0	\$3.6	\$80.0
Lassen	100 years	50%	\$0.4	\$4.0	\$3.6	
*Los Angeles	30 years	64%	\$130.0	\$200.0	\$70.0	\$500.0
Marin	50 years	76%	\$2.1	\$7.4	\$5.3	\$56.1
Mendocino		81%	\$14.2	\$14.8	\$0.6	\$90.0
Merced	100 years	65%	\$1.5	\$5.5	\$4.0	\$500.0
Modoc	Infinite	76%	\$3.3	\$13.0	\$9.7	\$45.0
Napa	41 years		\$2.7	\$8.0	\$5.3	\$98.0
Nevada	50 years	45%	\$10.5	\$14.5	\$4.0	\$26.0
Orange	75 years		\$1.5	\$3.5	\$2.0	
Placer	35 years	25%	\$15.0	\$27.0	\$12.0	\$100.0
Plumas	30 years	80%	\$4.0	\$7.0	\$3.0	\$45.0
Riverside	43 year	60%	\$15.0	\$38.0	\$23.0	\$100.0
Sacramento	84 years	36%	\$44.0	\$106.5	\$62.5	\$150.0
San Bernardino	20 years	35%	\$27.0	\$152.0	\$125.0	\$88.0
San Diego	104 years		\$5.0	\$5.0	\$5.0	
San Francisco	50 years		\$15.9	\$51.1	\$35.2	\$318.2
San Joaquin	55 years	44%	\$8.5	\$21.5	\$13.0	\$223.0
San Luis Obispo	Infinite	48%		\$9.0	\$9.0	\$80.0
San Mateo	Infinite	35%				\$100.0
Santa Barbara	30 years	47%	\$5.3	\$18.1	\$12.8	\$170.0
Santa Clara	45 years		\$3.4	\$11.2	\$7.8	\$72.5
Santa Cruz	60 years	39%		\$3.5	\$3.5	\$80.0
Shasta	100 years		\$12.0	\$24.0	\$12.0	
Solano	80 years		\$4.0	\$5.1	\$1.2	\$41.5
Sonoma	100 years	50%	\$4.2	\$22.8	\$18.7	\$262.8
Tehama			\$2.6	\$7.5	\$4.9	
Trinity	50 years		\$1.5	\$3.0	\$1.5	
Tulare	36 years	60%	\$8.8	\$26.8	\$18.1	\$254.0
Tuolumne	Infinite	56%	\$7.0	\$12.0	\$5.0	\$82.0
*Ventura	84 years	30%	\$11.5	\$14.1	\$2.6	\$52.0
Yolo	100 years		\$1.0	\$10.0	\$9.0	\$32.0
TOTALS			\$419.9	\$957.6	\$548.6	\$4,405.7

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Of the 58 counties, 42 responded as shown above.

- * Figures for Los Angeles County include traffic congestion needs.
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PRIORITY PROJECTS LIST FOR LOSING STATE TRANSPORTATION IMPROVEMENT PROGRAM FUNDING (PARCIAL LIST) IN MILLIONS (CONF)

Santa Barbara	US 101 Widening near Santa Maria	\$20.6	\$20.6	Maldonado	Blakelee
	US 101 Mijas/Cabrillo Hot Springs Improvement	\$37.5	\$45.5	McClintock	Nava
Santa Cruz	SR 17/Rte 1 Merge Lanes	\$48.0	\$52.0	Similan	Laird
	MetroBase Consolidated Bus Ops Facility	\$14.2	\$39.5	Similan and Maldonado	Laird and Satinas
Shasta	Redding Downtown Street Alignments	\$4.8	\$4.8	Amestad	La Malfa
	Liberty Street to I-5 Lane and Bridge Widening	\$10.1	\$10.1	Amestad	La Malfa
	Dana Ramp Lane and Bridge Widening	\$30.0	\$30.0	Amestad	La Malfa
Sierra	Gold Lake Hwy Bridge Rehabilitation	\$0.1	\$0.6	Cox	Keene
	Goodyears Creek Bridge Rehabilitation	\$0.1	\$0.7	Cox	Keene
	Sierra Buttes Rd at Reis Ravine	\$0.09	\$0.5	Cox	Keene
Solano	Vallejo Ferry Terminal Intermodal Station	\$7.3	\$19.3	Aligden	Berg
Sonoma	US 101 HOV -Steele Lane to Rt 12	\$48.9	\$60.0	Chesbo	Berg, Notten and Evans
	US 101 -Steele Lane Interchange Modification	\$13.4	\$13.4	Chesbo	
Sutter	SR 99 Widening	\$60.5	\$60.5	Amestad	La Malfa
	SR 70 Expressway	\$103.7	\$103.7	Amestad	La Malfa
Tehama	Rawson Rd at Red Bank Creek Bridge Replacement	\$0.1	\$2.7	Amestad	La Malfa
	Flores Rd Access	\$3.9	\$6.1	Amestad	La Malfa
Tulare	SR 63 Widening	\$25.0	\$25.0	Flores and Ashburn	Matz
	Rd 80 Widening	\$32.0	\$65.0	Flores and Ashburn	Parra and Matz
	Rd 108 Widening	\$12.0	\$18.0	Flores and Ashburn	Matz
Tuolumne	SR 108/East Sonora Bypass	\$28.0	\$28.0	Poothigian	Cogdill
	Road Pavement (various)	\$2.8	\$3.5		
Ventura	Rt 23 Widening - Rt 118 to Rt 101	\$40.0	\$50.7	McClintock	Strickland
	Rt 118- LA County Line to Topo Cyn Rd	\$45.7	\$45.7	McClintock	Richman
	Lewis Rd Widening - Rt 101/CSUC	\$18.2	\$25.8	McClintock	Favley
Yuba	Highway 70/Algodan Road	\$11.2	\$21.0	Cox	Keene
Total		\$2,423.0	\$10,375.7		

This list is based on a survey of Regional Transportation Planning Agencies (RTPAs) conducted in November 2004 by RTPA Chair Celia McAdam. Of the 58 counties, 44 were included in the RTPAs' responses.

APPENDIX OF DEFERRED ROAD PAVEMENT AND MAINTENANCE PROGRAMS

DUE TO FUNDING SHORTFALLS

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Placer	35 years	25%	\$15.0	\$27.0	\$12.0	\$100.0
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**FOR FURTHER INFORMATION
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5-1.30

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
 CHECK JOURNAL DETAIL BY CHECK NUMBER
 ALL CHECKS FOR COAST COMMERCIAL BANK

DATE: 12/01/04 THRU 12/31/04

CHECK NUMBER	CHECK DATE	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
13914	12/03/04	86.51	001	SBC	3079	NOV PHONE LINES	86.51	
13915	12/03/04	461,549.64	001015	A-Z BUS SALES, INC.	3059	PARA BUSES/DIAL RIDE	192,622.35	
					3060	PARA BUSES/FIXED RT	268,927.29	
13916	12/03/04	508.00	001042	EMPLOYER'S HEALTH SVCS, LLC	3080	OCT DRUG TESTING	234.00	
					3081	OCT DRUG TESTING	274.00	
13917	12/03/04	2,050.00	001046	DESMOND, MARCELLO & AMSTER	3082	PROF SVCS THRU 10/31	756.25	
					3083	PROF SVCS THRU 10/31	712.50	
					3084	PROF SVCS THRU 10/31	581.25	
13918	12/03/04	1,283.88	001048	CRUZ CAR WASH	3085	REV VEH FUEL/PT	1,046.05	
					3086	VEH WASH SVCS/PT	237.83	
13919	12/03/04	5,617.10	001063	NEW FLYER INDUSTRIES LIMITED	3061	REV VEH PARTS 3087	3,086.66	
					3062	REV VEH PARTS 241	240.92	
					3063	REV VEH PARTS 2290	2,289.52	
13920	12/03/04	30.00	001271	DEPARTMENT OF MOTOR VEHICLES	3087	EMPLOYER TESTING/OPS	30.00	
13921	12/03/04	138.83	001296	LEXISNEXIS MATTHEW BENDER	3088	EMP LAW DSKBK REL#16	138.83	
13922	12/03/04	330.87	001315	WASTE MANAGEMENT	3089	NOV MT HERMON/KINGS	43.27	
					3090	NOV KINGS VILLAGE	145.23	
					3091	NOV RESEARCH PARK	142.37	
13923	12/03/04	115,525.41	001316	DEVCO OIL	3092	NOV FUEL	115,525.41	
13924	12/03/04	2,840.00	001492	EVERGREEN OIL INC.	3093	HAZ WASTE DISPOSAL	2,605.00	
					3094	HAZ WASTE DISPOSAL	235.00	
13925	12/03/04	566.58	001733	STODLEY'S SMALL ENGINE SERVIC 7	3095	REPAIRS/MAINTENANCE	566.58	
13926	12/03/04	57,067.32	001762	COMMUNITY BRIDGES	3096	OCT ADA PT/BAL DUE	57,067.32	
13927	12/03/04	106.18	001996	JAMES PUBLISHING, INC.	3097	LITIGATN FORMS & CD	106.18	
13928	12/03/04	91.70	002063	COSTCO	3098	PHOTO PROCESS/OPS	36.16	
					3099	LOCAL MEETING EXP	55.54	
13929	12/03/04	208.45	002069	A TOOL SHED, INC.	3100	EQUIPMENT RENTAL	208.45	
13930	12/03/04	370.00	002106	AMERICAN SUPPLY COMPANY	3101	CLEANING SUPPLIES/PT	370.00	
13931	12/03/04	2,428.88	002117	IULIANO, NICK	7 3102	04/05 PROP TAXES #1	2,428.88	
13932	12/03/04	201.68	002161	APPLIED INDUSTRIAL TECH	3103	IDLERS/TENSIONERS	146.72	
					3104	CNG CMPSR BEARINGS	54.96	
13933	12/03/04	744.91	002189	BUS & EQUIPMENT	3105	REV VEH PARTS/PT 214	232.04	
					3106	REV VEH PARTS/PT 453	512.87	
13934	12/03/04	2,000.00	002267	SHAW & YODER, INC.	3107	OCT LEGISLATIVE SVCS	2,000.00	
13935	12/03/04	3,750.00	002346	CHANEY, CAROLYN & ASSOC., INC.	3108	DEC LEGISLATIVE SVCS	3,750.00	
13936	12/03/04	1,416.90	002412	BORDEN DECAL	3064	REV VEH PARTS	1,416.90	
13937	12/03/04	160.00	002567	DEPARTMENT OF JUSTICE	3109	OCT FINGERPRINTS	160.00	
13938	12/03/04	290.00	002700	SANTA CRUZ COUNTY	3110	HEALTH PERMIT	290.00	
13939	12/03/04	3,759.34	002721	NEXTEL COMMUNICATIONS	3111	10/6-11/3 PHONES/PT	1,375.44	
					3112	EQUIPMENT/PT	2,383.90	
13940	12/03/04	987.03	009	PACIFIC GAS & ELECTRIC	3113	10/13-11/13 RESEARCH	59.85	
					3114	10/13-11/13 RESEARCH	927.18	
13941	12/03/04	120.00	014	CABRILLO COLLEGE	3115	FINGERPRINTING	120.00	
13942	12/03/04	387.87	020	ADT SECURITY SERVICES INC.	3116	DEC ALARMS	387.87	
13943	12/03/04	146.66	039	KINKO'S INC.	3117	OCT PRINTING	146.66	
13944	12/03/04	1,050.33	059	BATTERIES USA, INC.	3065	REV VEH PARTS	1,050.33	
13945	12/03/04	113.36	061A	REGISTER PAJARONIAN	3118	CLASSIFIED AD	113.36	
13946	12/03/04	1,889.74	130	CITY OF WATSONVILLE UTILITIES	3119	CONTAINER RODRIGUEZ	1,289.04	
					3120	9/2-11/2 RODRIGUEZ	477.68	
					3121	9/2-11/2 RODRIGUEZ	60.31	

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SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
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						3122	9/2-11/2 RODRIGUEZ	62.71	
13947	12/03/04	118.18	135	SANTA CRUZ AUTO PARTS, INC.		3123	REV VEH PARTS/PT	118.18	
13948	12/03/04	270.79	147	ZEE MEDICAL SERVICE CO.		3124	SAFETY SUPPLIES	270.79	
13949	12/03/04	36.99	152	BALDWIN COOKE		3125	EXEC PLANNER 27	36.99	
13950	12/03/04	974.56	161	OCEAN CHEVROLET INC		3126	REV VEH PARTS/PT	56.64	
						3127	OUT REPAIR/#208 PT	917.92	
13951	12/03/04	7.00	172	CENTRAL WELDER'S SUPPLY, INC.		3066	PARTS & SUPPLIES	7.00	
13952	12/03/04	3,072.00	180	MANPOWER		3128	TEMP/IT W/E 11/7	1,536.00	
						3129	TEMP/IT W/E 11/14	1,536.00	
13953	12/03/04	4,792.25	221	VEHICLE MAINTENANCE PROGRAM		3067	REV VEH PARTS 331	330.80	
						3068	REV VEH PARTS 4461	4,461.45	
13954	12/03/04	44.92	282	GRAINGER		3130	REPAIRS/MAINTENANCE	44.92	
13955	12/03/04	2,039.93	378	STEWART & STEVENSON		3069	REV VEH PARTS	2,039.93	
13956	12/03/04	558.32	395	APPLIED GRAPHICS, INC.		3174	GOLF UMBRELLAS/PT	558.32	
13957	12/03/04	138.29	436	WEST PAYMENT CENTER		3131	OCT ACCESS CHGS	138.29	
13958	12/03/04	100.00	465	STATE BAR OF CALIFORNIA		3132	PROGRAM MAT'L/LEGAL	100.00	
13959	12/03/04	5,102.13	475	TRAPEZE SOFTWARE GROUP, INC.		3133	MAINT/PT 9/04-8/05	5,102.13	
13960	12/03/04	275,222.18	502	CA PUBLIC EMPLOYEES'		3134	DEC MEDICAL INS	275,222.18	
13961	12/03/04	808.71	504	CUMMINS WEST, INC.		3070	REV VEH PARTS	42.67	
						3071	REV VEH PARTS/SUPPLY	20.53	
						3072	REV VEH PARTS	745.51	
13962	12/03/04	177.90	579	LAB SAFETY SUPPLY, INC.		3135	DRUM GAUGE 166	177.90	
13963	12/03/04	962.00	639	72 DEGREES		3136	RPR FANS/SENSORS WTC	962.00	
13964	12/03/04	782.83	647	GFI GENFARE		3073	REV VEH PARTS	782.83	
13965	12/03/04	4,901.17	664	BAY COUNTIES PITCOCK PETROLEUM		3074	ENGINE OIL/DUB	4,901.17	
13966	12/03/04	11,732.94	667	CITY OF SCOTTS VALLEY		3137	ZONE 1/BLUEBONNET	7,865.54	
						3138	ZONE 12/WASTEWATER	3,867.40	
13967	12/03/04	26.48	669	COMPUTER BOOK DIRECT		3139	BOOK/IT 20	26.48	
13968	12/03/04	10,993.27	676	WEBER, HAYES & ASSOCIATES		3140	ENV ASSESS BUS PARKG	10,993.27	
13969	12/03/04	70.00	682	WEISS, AMY L.	7	3141	PROF SVCS 11/19	70.00	
13970	12/03/04	9,056.25	683	TRISTAR RISK MANANGEMENT		3142	DEC WC SVC FEE	9,056.25	
13971	12/03/04	139.66	699	SALINAS CASH REGISTER CO INC		3143	TIMECLK RIBBONS/OPS	139.66	
13972	12/03/04	283.30	711	GLASS DOCTOR	7	3075	OUT REPAIR OTHER VEH	283.30	
13973	12/03/04	925.10	733	CLAREMONT BEHAVIORAL SERVICES		3144	DEC EAP PREMIUM	925.10	
13974	12/03/04	295.66	788	SCMTD PETTY CASH - FINANCE		3145	PETTY CASH/FINANCE	295.66	
13975	12/03/04	2,920.00	804	ORTHOPAEDIC HOSPITAL	7	3146	OCT PROF/TECH SVCS	2,920.00	
13976	12/03/04	3,034.35	816	MISSION VALLEY FORD		3076	OUT REPAIR OTHER VEH	3,034.35	
13977	12/03/04	297.50	819	MONEY SYSTEMS TECHNOLOGY, INC.		3147	MAINT/COIN SORTER	297.50	
13978	12/03/04	1,574.90	852	LAW OFFICES OF MARIE F. SANG	7	3148	WORKERS COMP CLAIMS	1,574.90	
13979	12/03/04	6,199.60	909	CLASSIC GRAPHICS		3077	OUT REPAIR REV VEH	6,199.60	
13980	12/03/04	195.00	915	WORKIN.COM, INC.		3149	11/5-12/4 JOB POST	195.00	
13981	12/03/04	303.07	932	A.L. LEASE COMPANY, INC.		3150	REPAIRS/MAINTENANCE	303.07	
13982	12/03/04	2,000.00	936	ENVIRO SCIENCE, INC.		3151	HAZ MATL SURVEY/MB	2,000.00	
13983	12/03/04	93.24	940	HISTORIC MISSION INN		3152	CONFIRM #277349	93.24	
13984	12/03/04	4,941.00	949A	NATIONAL FLOOD SERVICES		3153	FLOOD INSURANCE	4,941.00	
13985	12/03/04	67,642.88	975	TRISTAR RISK MANAGEMENT NO. 2		3154	NOV TRUST ACCOUNT	67,642.88	
13986	12/03/04	100.00	B001	AINSWORTH, SHERYL	7	3163	NOV BOARD MEETING	100.00	
13987	12/03/04	100.00	B003	BEAUTZ, JAN	7	3164	NOV BOARD MEETING	100.00	
13988	12/03/04	50.00	B006	HINKLE, MICHELLE	7	3165	NOV BOARD MEETING	50.00	
13989	12/03/04	100.00	B007	KEOGH, MICHAEL	7	3166	NOV BOARD MEETING	100.00	

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13990	12/03/04	100.00	B010	NORTON, DENNIS	7	3167	NOV BOARD MEETING	100.00	
13991	12/03/04	100.00	B011	REILLY, EMILY	7	3168	NOV BOARD MEETING	100.00	
13992	12/03/04	100.00	B012	SPENCE, PAT	7	3171	NOV BOARD MEETING	100.00	
13993	12/03/04	100.00	B014	CITY OF WATSONVILLE		3173	NOV BOARD MEETING	100.00	
13994	12/03/04	50.00	B015	ROTKIN, MIKE	7	3169	NOV BOARD MEETING	50.00	
13995	12/03/04	100.00	B016	SKILLICORN, DALE	7	3170	NOV BOARD MEETING	100.00	
13996	12/03/04	100.00	B017	STONE, MARK	7	3172	NOV BOARD MEETING	100.00	
13997	12/03/04	34.00	E059	LEE, HENRY		3078	DRIVER LICENSE	34.00	
13998	12/03/04	34.00	E315	DEMERS, JANET		3155	DMV FEES	34.00	
13999	12/03/04	64.00	E316	GAGNIER, JEAN		3156	DMV FEES	64.00	
14000	12/03/04	34.00	E319	HERNANDEZ, ALICIA		3157	DMV FEES	34.00	
14000P12/03/04		-34.00	E319	HERNANDEZ, ALICIA		3328	VOID CHECK	-34.00	PRE-PAID
				VOID CHECK					
14001	12/03/04	64.00	E322	HICKEY, MARK		3158	DMV FEES	64.00	
14002	12/03/04	64.00	E325	MALDONADO, ROBERT		3159	DMV FEES	64.00	
14003	12/03/04	35.00	E327	YEPEZ, RICARDO		3160	DMV FEES	35.00	
14004	12/03/04	64.00	E329	ZARAGOZA, DANIEL		3161	DMV FEES	64.00	
14005	12/03/04	44.00	E368	MORR, BONNIE		3162	DMV/VTT FEES	44.00	
14006	12/03/04	72.14	M001	HORTON, JOSEPH		9000238	MED INS PREMIUM REIM	72.14	
14007	12/03/04	41.14	M002	RACKLEY, EARL		9000239	MED INS PREMIUM REIM	41.14	
14008	12/03/04	228.77	M003	WYANT, JUDI		9000240	MED INS PREMIUM REIM	228.77	
14009	12/03/04	228.77	M005	ROSS, EMERY		9000241	MED INS PREM REIMB	228.77	
14010	12/03/04	596.40	M006	VAN DER ZANDE, ED		9000242	MED INS PREM REIMB	596.40	
14011	12/03/04	489.54	M007	BLAIR-ALWARD, GREGORY		9000243	MED INS PREM REIMB	489.54	
14012	12/03/04	72.14	M008	CAMPOS, ARVILLA		9000244	MED INS PREM REIMB	72.14	
14013	12/03/04	816.40	M009	FREEMAN, MARY		9000245	MED INS PREM REIMB	816.40	
14014	12/03/04	280.84	M010	SHORT, SLOAN		9000246	MED INS PREM REIMB	280.84	
14015	12/03/04	41.14	M011	LAWSON, LOIS		9000247	MED INS PREM REIMB	41.14	
14016	12/03/04	41.14	M012	ROSE, JACK		9000248	MED INS PREM REIMB	41.14	
14017	12/03/04	72.14	M013	JAHNKE, EILEEN		9000249	MED INS PREM REIMB	72.14	
14018	12/03/04	41.14	M015	HETH, KATHRYN		9000250	MED INS PREM REIMB	41.14	
14019	12/03/04	249.84	M016	HICKLIN, DONALD KENT		9000251	MED INS PREM REIMB	249.84	
14020	12/03/04	20.07	M017	PORTILLA, EARLENE		9000252	MED INS PREM REIMB	20.07	
14021	12/03/04	219.57	M022	CAPELLA, KATHLEEN		9000253	MED INS PREM REIMB	219.57	
14022	12/03/04	8.94	M023	CARLSON, WILLIAM		9000254	MED INS PREM REIMB	8.94	
14023	12/03/04	30.44	M024	DOBBS, GLENN		9000255	MED INS PREM REIMB	30.44	
14024	12/03/04	35.19	M025	ELIA, LARRY		9000256	MED INS PREM REIMB	35.19	
14025	12/03/04	30.44	M028	ORTEGA, MANUELA		9000257	MED INS PREM REIMB	30.44	
14026	12/03/04	39.94	M029	REESE, CHARLES		9000258	MED INS PREM REIMB	39.94	
14027	12/03/04	11.34	M032	TOWE, JANIE		9000259	MED INS PREM REIMB	11.34	
14028M12/06/04		6,927.37	001044	PACKET FUSION, INC.		3182	SYSTEM/PT BAL DUE	6,927.37	MANUAL
				SYSTEM/PT BAL DUE					
14029M12/08/04		30,360.00	001076	BROUGHTON LAND, LLC		3180	LEASE PMT/DEPOSIT	30,360.00	MANUAL
				LEASE PMT/DEPOSIT					
14030	12/10/04	487.00	002550	COASTAL BUSINESS MACHINES INC.		3177	REFURBISH APC UPS/IT	487.00	
14031	12/10/04	62,005.54	975	TRISTAR RISK MANAGEMENT NO. 2		3178	SPCL REPLENISHMENT	38,370.00	
						3179	SPCL REPLENISHMENT	23,635.54	
14032	12/17/04	595.52	001	SBC		3236	DEC PHONE/IT	595.52	
14033	12/17/04	192.50	001027	OVERLAND PACIFIC & CUTLER, INC		3237	MB PROF SVCS OCT04	192.50	
14034	12/17/04	675.20	001029	GOLDEN GATE SYSTEMS		3238	COMPUTER SUPPLIES/IT	675.20	

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14035	12/17/04	444.00	001042	EMPLOYER'S HEALTH SVCS, LLC		3239	NOV DRUG TESTING	444.00	
14036	12/17/04	11,335.46	001043	VISION SERVICE PLAN		3240	DEC VISION INSURANCE	11,335.46	
14037	12/17/04	145.00	001044	PACKET FUSION, INC.		3241	OUT REPAIR PHONES/PT	145.00	
14038	12/17/04	7,945.13	001063	NEW FLYER INDUSTRIES LIMITED		3183	REV VEH PARTS 5238	5,238.38	
						3184	REV VEH PARTS 1191	1,190.81	
						3185	REV VEH PARTS 371	371.02	
						3186	REV VEH PARTS 1145	1,144.92	
						3187	RECON RADIATOR #9821	996.73	
14039	12/17/04	996.73	001263	ABBOTT STREET RADIATOR, INC.		3242	HAZ WASTE DISPOSAL	814.47	
14040	12/17/04	814.47	001379	SAFETY-KLEEN SYSTEMS, INC.		3243	12/1-2/28 COPIER/ADM	154.34	
14041	12/17/04	154.34	001454	MONTEREY BAY OFFICE PRODUCTS		3244	OUT REPAIR BLDGS/IMP	285.00	
14042	12/17/04	285.00	001491	TRI-COUNTY FIRE PROTECTION INC		3245	HAZ WASTE DISPOSAL	30.00	
14043	12/17/04	30.00	001492	EVERGREEN OIL INC.		3247	OCT MEDICAL EXAMS	1,056.00	
14044	12/17/04	1,056.00	001523	SANTA CRUZ MEDICAL CLINIC	7	3248	DEC LTD INSURANCE	16,753.32	
14045	12/17/04	16,753.32	001616	UNUM		3188	NOV FUEL	20.53	
14046	12/17/04	20.53	001648	STEVE'S UNION SERVICE		3189	REV VEH PARTS	204.61	
14047	12/17/04	204.61	001800	THERMO KING OF SALINAS, INC		3249	OUT REPAIR PHONES	37.50	
14048	12/17/04	158.70	001856	BAY COMMUNICATIONS	7	3250	OUT REPAIR PHONES	121.20	
14049	12/17/04	289.00	001896	NATIONAL BUSINESS INSTITUTE		3251	1/13/05 SEMINAR	289.00	
14050	12/17/04	455.00	001930	STATE BAR OF CALIFORNIA		3252	2005 MEMBERSHIP	455.00	
14051	12/17/04	135.00	001945	SANTA CRUZ COUNTY BAR ASSN		3253	2005 MEMBER DUES	135.00	
14052	12/17/04	4,901.18	001A	SBC/MCI		3254	NOV PHONE/IT	92.08	
						3255	NOV PHONE/IT	176.87	
						3256	NOV PHONE/IT	176.87	
						3257	NOV PHONES	2,089.25	
						3258	NOV PHONES/PT	254.91	
						3259	NOV PHONES/PT	1,593.21	
						3260	NOV PHONES/PT	517.99	
14053	12/17/04	449.86	002012	CARTER, H.V. CO. INC.		3261	REPAIRS/MAINTENANCE	449.86	
14054	12/17/04	58.70	002063	COSTCO		3262	PHOTO PROCESS/OPS	58.70	
14055	12/17/04	2,550.00	002287	CALIFORNIA SERVICE EMPLOYEES		3263	DEC MEDICAL	2,550.00	
14056	12/17/04	748.11	002504	TIFCO INDUSTRIES		3190	PARTS & SUPPLIES	748.11	
14057	12/17/04	35.72	002514	APEX WELDING SUPPLIES INC.		3264	REPAIRS/MAINTENANCE	35.72	
14058	12/17/04	450.00	002542	WILDPACKETS		3265	ETHERPEEK MAINT 2YR	450.00	
14059	12/17/04	350.00	002624	DIGITAL RECORDERS		3191	REV VEH PARTS 350	350.00	
14060	12/17/04	193.38	002639	NEXTEL COMMUNICATIONS		3192	10/26-11/25 PHONES	193.38	
14061	12/17/04	229.00	002675	THOMSON-WEST BARCLAYS		3193	MOTOR VEHICLE US	229.00	
14062	12/17/04	3,168.08	002713	SANTA CRUZ AUTO TECH, INC.		3194	OUT REPAIR #202	1,401.38	
						3195	OUT REPAIR #8020	1,211.84	
						3196	OUT REPAIR #202	554.86	
						3197	REV VEH PARTS	184.41	
14063	12/17/04	184.41	004	NORTH BAY FORD LINC-MERCURY		3198	10/31-11/30 CNG/G RV	11,072.27	
14065	12/17/04	26,281.38	009	PACIFIC GAS & ELECTRIC		3235	10/30-12/1 CNG/E RVR	1,545.30	
						3266	10/29-11/30 RDRIGUEZ	1,237.47	
						3267	10/29-11/30 RDRIGUEZ	68.12	
						3268	10/30-12/1 GOLF CLUB	1,202.61	
						3269	10/30-12/1 GOLF CLUB	1,657.00	
						3270	10/30-12/1 RIVER ST	1,694.68	
						3271	10/30-12/1 111 DUB	702.03	
						3272	10/30-12/1 111 DUB	1,381.50	

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					3273	10/30-12/1 RIVER ST	496.69	
					3274	10/30-12/1 370 ENC	2,042.22	
					3275	10/30-12/1 370 ENC	894.10	
					3276	11/4-12/3 PACIFIC	1,035.77	
					3277	11/4-12/3 PACIFIC	470.87	
					3278	11/4-12/3 PACIFIC	289.21	
					3279	11/9-12/9 KINGS VLG	467.69	
					3280	11/9-12/9 KINGS VLG	23.85	
14066	12/17/04	2,025.78	018 SALINAS VALLEY FORD SALES		3199	REV VEH PARTS	1,191.37	
					3200	REV VEH PARTS	487.13	
					3201	REV VEH PARTS	347.28	
					3281	PAINT/METRO	26.37	
14067	12/17/04	26.37	036 KELLY-MOORE PAINT CO., INC.		3282	NOV PRINTING	539.06	
14068	12/17/04	539.06	039 KINKO'S INC.		3202	NOV UNIFORMS/LAUNDRY	1,872.81	
14069	12/17/04	2,435.57	041 MISSION UNIFORM		3283	OCT/NOV UNIF/LAUNDRY	562.76	
					3284	REPAIRS/MAINTENANCE	340.91	
14070	12/17/04	340.91	042 ORCHARD SUPPLY HARDWARE		3285	REPAIRS/MAINTENANCE	22.63	
14071	12/17/04	22.63	045 ROYAL WHOLESALE ELECTRIC		3203	REV VEH PARTS	1,050.33	
14072	12/17/04	1,050.33	059 BATTERIES USA, INC.		3286	CLEANING SUPPLIES	944.13	
14073	12/17/04	944.13	068 UNITED LABORATORIES		3287	NOV LOCKS/KEYS	80.36	
14074	12/17/04	80.36	074 KENVILLE LOCKSMITHS	7	3288	9/28-11/29 RESEARCH	304.00	
14075	12/17/04	304.00	079 SANTA CRUZ MUNICIPAL UTILITIES		3204	NOV TIRES/TUBES	13,875.97	
14076	12/17/04	13,875.97	085 DIXON & SON TIRE, INC.		3289	EMP INCENTIVE 140	156.46	
14077	12/17/04	156.46	087 RECOGNITION SERVICES		3205	PARTS & SUPPLIES	275.94	
14078	12/17/04	275.94	104 STATE STEEL COMPANY		3206	PRINTER PAPER FLEET	49.71	
14079	12/17/04	49.71	105 SHIELDS, HARPER & CO., INC.		3290	REPAIRS/MAINTENANCE	247.48	
14080	12/17/04	247.48	107 SAN LORENZO LUMBER		3207	COMPLETE SOLUS ASSY	2,793.23	
14081	12/17/04	2,793.23	115 SNAP-ON INDUSTRIAL		3208	REV VEH PARTS	2,751.55	
14082	12/17/04	3,025.24	117 GILLIG CORPORATION		3209	REV VEH PARTS	273.69	
					3291	10/12-12/1 SAKATA	13.45	
14083	12/17/04	95.10	130 CITY OF WATSONVILLE UTILITIES		3292	10/12-12/1 RODRIGUEZ	9.50	
					3293	11/1-12/1 SAKATA	72.15	
					3210	NOV/DEC OUT RPR EQP	4,507.00	
14084	12/17/04	4,507.00	134 DAY WIRELESS SYSTEMS		3211	REV VEHPARTS/SUPPLY	1,365.75	
14085	12/17/04	1,365.75	135 SANTA CRUZ AUTO PARTS, INC.		3294	CLASSIFIED AD	898.69	
14086	12/17/04	898.69	145 SAN JOSE MERCURY NEWS		3295	SAFETY SUPPLIES	375.03	
14087	12/17/04	375.03	147 ZEE MEDICAL SERVICE CO.		3296	NOV ADVERTISING	169.02	
14088	12/17/04	169.02	149 SANTA CRUZ SENTINEL		3212	REV VEH PARTS	641.14	
14089	12/17/04	641.14	161 OCEAN CHEVROLET INC		3213	PARTS & SUPPLIES	793.87	
14090	12/17/04	793.87	166 HOSE SHOP, THE		3214	OTHER MOBILE SUPPLY	343.13	
14091	12/17/04	343.13	167 KEYSTON BROTHERS		3215	REV VEH PARTS/SUPPLY	577.06	
14092	12/17/04	577.06	170 TOWNSEND'S AUTO PARTS		3216	PARTS & SUPPLIES	7.00	
14093	12/17/04	7.00	172 CENTRAL WELDER'S SUPPLY, INC.		3297	TEMP/IT W/E 11/21	1,536.00	
14094	12/17/04	1,536.00	180 MANPOWER		3217	OCT FUEL FLEET	1,432.24	
14095	12/17/04	1,432.24	191 GOLDEN GATE PETROLEUM		3298	REPAIRS/MAINTENANCE	2,641.83	
14096	12/17/04	2,641.83	192 ALWAYS UNDER PRESSURE		3299	COPIER/OPS 11/9-12/9	192.99	
14097	12/17/04	10,182.99	215 IKON OFFICE SOLUTIONS		3300	COPIER/PARACRUZ	9,990.00	
					3218	SMALL TOOLS	65.17	
14098	12/17/04	1,397.37	282 GRAINGER		3219	CLEANING SUPPLY FLT	107.58	
					3220	PARTS & SUPPLIES	389.31	

5-2.5

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
 CHECK JOURNAL DETAIL BY CHECK NUMBER
 ALL CHECKS FOR COAST COMMERCIAL BANK

DATE: 12/01/04 THRU 12/31/04

CHECK NUMBER	CHECK DATE	CHECK AMOUNT	VENDOR	VENDOR NAME	TRANS. TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
						3221	CLEANING SUPPLY FLT	785.63	
						3301	REPAIRS/MAINTENANCE	49.68	
14099	12/17/04	359.66	288	MUNCIE TRANSIT SUPPLY		3222	REV VEH PARTS	359.66	
14100	12/17/04	520.50	294	ANDY'S AUTO SUPPLY		3223	REV VEH PARTS/SUPPLY	520.50	
14101	12/17/04	153.00	367	COMMUNITY TELEVISION OF		3302	TV COVERAG 11/19 MTG	153.00	
14102	12/17/04	102.35	378	STEWART & STEVENSON		3224	REV VEH PARTS	102.35	
14103	12/17/04	378.11	395	APPLIED GRAPHICS, INC.		3303	LETTERHEAD/ADM	378.11	
14104	12/17/04	15.64	418	COUNTY OF SANTA CRUZ		3225	CNG FUEL	7.62	
						3226	CNG FUEL	8.02	
14105	12/17/04	164.03	434	VERIZON WIRELESS-PAGERS		3304	DEC PAGERS	164.03	
14106	12/17/04	53.29	434B	VERIZON CALIFORNIA		3227	MT BIEWLASKI	53.29	
14107	12/17/04	129.54	436	WEST PAYMENT CENTER		3305	NOV ACCESS CHGS	129.54	
14108	12/17/04	2,628.45	447	FERRIS HOIST & REPAIR, INC.		3228	OUT REPAIR HOIST	2,628.45	
14109	12/17/04	19,288.00	475	TRAPEZE SOFTWARE GROUP, INC.		3306	TRAPEZE FOR PT	19,288.00	
14110	12/17/04	2,363.64	480	DIESEL MARINE ELECTRIC, INC.		3229	REV VEH PARTS	2,363.64	
14111	12/17/04	321.00	481	PIED PIPER EXTERMINATORS, INC.		3307	NOV PEST CONTROL/	225.50	
						3308	STORTIES/CHINA EXP	95.50	
14112	12/17/04	163.19	504	CUMMINS WEST, INC.		3230	REV VEH PARTS	163.19	
14113	12/17/04	94.00	507	LORMAN EDUCATION SERVICES		3309	EMP ADA/FMLA 89	94.00	
14114	12/17/04	510.00	571	MONTEREY INFORMATION TECH.		3310	PROF/TECH SVCS IT	150.00	
						3311	PROF/TECH SVCS IT	360.00	
14115	12/17/04	256.01	582	TOYOTA OF SANTA CRUZ		3231	REV VEH PARTS	256.01	
14116	12/17/04	90.35	667	CITY OF SCOTTS VALLEY		3312	9/15-11/15 KINGS VLG	90.35	
14117	12/17/04	357.26	711	GLASS DOCTOR	7	3232	OUT REPAIR VEH #908	357.26	
14118	12/17/04	200.00	760	SCMTD PETTY CASH - PARACRUZ		3313	PETTY CASH FUND	200.00	
14119	12/17/04	964.59	845A	BLUE SHIELD OF CALIFORNIA		3314	COBRA PREMIUMS	964.59	
14120	12/17/04	4,275.22	851	I.M.P.A.C. GOVERNMENT SERVICES		3315	4055019201231122	4,275.22	
14121	12/17/04	1,694.00	852	LAW OFFICES OF MARIE F. SANG	7	3316	WORKERS COMP CLAIMS	1,176.00	
						3317	WORKERS COMP CLAIMS	518.00	
14122	12/17/04	46,276.74	875	PACIFICARE DENTAL		3318	DEC DENTAL	46,276.74	
14123	12/17/04	8,199.31	909	CLASSIC GRAPHICS		3233	OUT REPAIR REV VEH	8,199.31	
14124	12/17/04	627.00	950	PARADISE LANDSCAPE	7	3319	DEC MAINTENANCE	627.00	
14125	12/17/04	33.86	973	SANTA CRUZ DODGE		3234	REV VEH PARTS	33.86	
14126	12/17/04	11,473.88	975	TRISTAR RISK MANAGEMENT NO. 2		3320	NOV TRUST ACCOUNT	11,473.88	
14127	12/17/04	41,625.31	977	SANTA CRUZ TRANSPORTATION, LLC		3321	NOV 04 PT SVCS	41,625.31	
14128	12/17/04	44.00	E136	STEBER, MIKE		3322	DMV/VTT FEES	44.00	
14129	12/17/04	34.00	E330	BARNI, FRANK		3323	DMV FEES	34.00	
14130	12/17/04	10.00	E370	HART, JUSTIN		3324	VTT FEES	10.00	
14131	12/17/04	44.00	E380	DEMPSEY, FREDERICK		3325	DMV/VTT FEES	44.00	
14132	12/17/04	44.00	E458	NELSON, EDWARD		3326	DMV/VTT FEES	44.00	
14133	12/17/04	310.00	R430	RADIOLOGY MEDICAL GROUP		3327	MEDICAL PAYMENT	310.00	
14134	12/23/04	1,064.48	009	PACIFIC GAS & ELECTRIC		3329	10/26-11/24 SAKATA	10.40	
						3331	11/11-12/13 PAUL SWT	84.18	
						3332	11/14-12/14 RESEARCH	200.04	
						3333	11/14-12/14 RESEARCH	769.86	
14135	12/23/04	1,732.00	080	STATE BOARD OF EQUALIZATION		3334	NOV USE TAX PREPAY	1,732.00	
14136	12/23/04	100.00	B003	BEAUTZ, JAN	7	3335	DEC BOARD MTG	100.00	
14137	12/23/04	50.00	B006	HINKLE, MICHELLE	7	3337	DEC BOARD MTG	50.00	
14138	12/23/04	100.00	B007	KEOGH, MICHAEL	7	3338	DEC BOARD MTG	100.00	
14139	12/23/04	100.00	B010	NORTON, DENNIS	7	3339	DEC BOARD MTG	100.00	

5-2.6

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
 CHECK JOURNAL DETAIL BY CHECK NUMBER
 ALL CHECKS FOR COAST COMMERCIAL BANK

DATE: 12/01/04 THRU 12/31/04

CHECK NUMBER	CHECK DATE	CHECK AMOUNT	VENDOR	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
14140	12/23/04	50.00	B011	REILLY, EMILY	7	3340	DEC BOARD MTG	50.00	
14141	12/23/04	100.00	B012	SPENCE, PAT	7	3343	DEC BOARD MTG	100.00	
14142	12/23/04	50.00	B014	CITY OF WATSONVILLE		3345	DEC BOARD MTG	50.00	
14143	12/23/04	100.00	B015	ROTKIN, MIKE	7	3341	DEC BOARD MTG	100.00	
14144	12/23/04	100.00	B016	SKILLICORN, DALE	7	3342	DEC BOARD MTG	100.00	
14145	12/23/04	100.00	B017	STONE, MARK	7	3344	DEC BOARD MTG	100.00	
14146	12/23/04	100.00	B018	BUSTICHI, DENE	7	3336	DEC BOARD MTG	100.00	
14147M1	12/27/04	9,079.52	941	FORTIS BENEFITS INSURANCE CO. JAN LTD INSURANCE		3363	JAN LTD INSURANCE	9,079.52	MANUAL
14148	12/30/04	482.43	001	SBC		3346	DEC PHONE LINES	86.51	
						3347	DEC PHONES	395.92	
14149	12/30/04	10,808.88	001075	SOQUEL III ASSOCIATES	7	9000260	RESEARCH PARK RENT	10,808.88	
14150	12/30/04	1,125.00	001090	BLUE DOLPHIN CAFE	7	3348	DEC CUSTODIAL SVCS	1,125.00	
14151	12/30/04	1,407.05	001119	MACERICH PARTNERSHIP LP	7	9000261	CAPITOLA MALL RENT	1,407.05	
14152	12/30/04	264.00	001523	SANTA CRUZ MEDICAL CLINIC	7	3349	NOV MEDICAL EXAMS	264.00	
14153	12/30/04	31,581.00	002116	HINSHAW, EDWARD & BARBARA	7	9000262	120 DUBOIS RENT	6,435.77	
						9000263	370 ENCINAL RENT	25,145.23	
14154	12/30/04	10,794.22	002117	IULIANO, NICK	7	9000264	111 DUBOIS RENT	10,794.22	
14155	12/30/04	56.40	002161	APPLIED INDUSTRIAL TECH		3350	CNG PULLEY BEARINGS	56.40	
14156	12/30/04	10,617.35	043	PALACE ART & OFFICE SUPPLY		3351	OFFICE SUPP/FILE CAB	10,617.35	
14157	12/30/04	35.28	079	SANTA CRUZ MUNICIPAL UTILITIES		3352	NOV LANDFILL	35.28	
14158	12/30/04	2,446.19	110	JESSICA GROCERY STORE, INC.		3353	DEC CUSTODIAN SCVS	2,446.19	
14159	12/30/04	12.71	372	FEDERAL EXPRESS		3355	DEC MAILING/FIN	12.71	
14160	12/30/04	191.92	510	ASCOM HASLER LEASING		3356	JAN EQUIP RENTAL	191.92	
14161	12/30/04	900.00	840	BOUCHARD, BRENT	7	9000265	VERNON ST RENT	900.00	
14162	12/30/04	51.24	856	ANGI INTERNATIONAL LLC		3357	BUSH IDLER/SHEAVE	384.07	
						3358	2 ELEMENTS/CREDIT	-502.52	
						3359	CNG VALVE RELIEF	169.69	
14163	12/30/04	87.00	893	MELLO, CATHY		3360	REFUND PT COUPONS	87.00	
14164	12/30/04	48.59	E016	MANGINI, LAURA		3361	HEATER/FINANCE	48.59	
14165	12/30/04	44.24	E155	SCARGILL, RAYMOND		3362	MED DEDUCT PP25	44.24	
14166	12/30/04	44.00	E180	FELDER, GEORGE		3354	DMV/VTT FEES	44.00	
14167	12/30/04	229.97	M003	WYANT, JUDI		3364	JAN MEDICAL PREMIUM	229.97	
14168	12/30/04	254.52	M005	ROSS, EMERY		3365	JAN MEDICAL PREMIUM	254.52	
14169	12/30/04	597.92	M006	VAN DER ZANDE, ED		3366	JAN MEDICAL PREMIUM	597.92	
14170	12/30/04	750.34	M007	BLAIR-ALWARD, GREGORY		3367	JAN MEDICAL PREMIUM	750.34	
14171	12/30/04	1,075.65	M009	FREEMAN, MARY		3368	JAN MEDICAL PREMIUM	1,075.65	
14172	12/30/04	364.49	M010	SHORT, SLOAN		3369	JAN MEDICAL PREMIUM	364.49	
14173	12/30/04	184.57	M016	HICKLIN, DONALD KENT		3370	JAN MEDICAL PREMIUM	184.57	
14174	12/30/04	413.09	M022	CAPELLA, KATHLEEN		3371	JAN MEDICAL PREMIUM	413.09	
14175	12/30/04	179.92	M024	DOBBS, GLENN		3372	JAN MEDICAL PREMIUM	179.92	
14176	12/30/04	204.98	M025	ELIA, LARRY		3373	JAN MEDICAL PREMIUM	204.98	
TOTAL		1,564,826.50		COAST COMMERCIAL BANK			TOTAL CHECKS	263	1,564,826.50

5-2-7

Page 1 of the Ridership Report will be included in the January 28, 2005 Board Packet.

S-3.1

BUS OPERATOR LIFT TEST *PULL-OUT*

VEHICLE CATEGORY	TOTAL BUSES	AVG # DEAD IN GARAGE	AVG # AVAIL. FOR SERVICE	AVG # IN SERVICE	AVG # SPARE BUSES	AVG # LIFTS OPERATING	% LIFTS WORKING ON PULL-OUT BUSES
FLYER/HIGHWAY 17 - 40'	7	0	7	0	7	0	100%
FLYER/LOW FLOOR - 40'	12	1	11	9	2	9	100%
FLYER/LOW FLOOR - 35'	18	2	16	12	4	12	100%
FLYER/HIGH FLOOR - 35'	15	2	13	4	9	4	100%
GILLIG/SAM TRANS - 40'	10	0	10	2	8	2	100%
DIESEL CONVERSION - 35'	15	2	13	11	2	11	100%
DIESEL CONVERSION - 40'	14	3	11	8	3	8	100%
ORION/HIGHWAY 17 - 40'	11	2	9	7	2	7	100%
GOSHEN	3	1	2	0	2	0	100%
TROLLEY	1	0	1	0	1	0	100%
CNG NEW FLYER - 40'	8	1	7	5	2	5	100%

5-3.2

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

PASSENGER LIFT PROBLEMS

MONTH OF DECEMBER 2004

BUS #	DATE	DAY	REASON
8075F	27-Dec	MONDAY	It took 30 mins for bus to come out of kneel
8082F	23-Dec	THURSDAY	Lift needs adjustment or repair
8105F	20-Dec	MONDAY	Kneel working intermittently
8105F	23-Dec	THURSDAY	Kneeling system not working
9809LF	7-Dec	TUESDAY	Ramp won't deploy with switch, must be lifted by hand
9839G	9-Dec	THURSDAY	Kneel not working

- F New Flyer
- G Gillig
- C Champion
- LF Low Floor Flyer
- GM GMC
- CG CNG
- CN SR855 & SR854
- OR Orion/Hwy 17

Note: Lift operating problems that cause delays of less than 30 minutes.

5-3.3

Service Interruption Summary Report
Lift Problems
12/01/2004 to 12/31/2004

AM Peak Hour/Mile	Midday Hour/Mile	PM Peak Hour/Mile	Other Hour/Mile	Weekday Hour/Mile	Saturday Hour/Mile	Sunday Hour/Mile
00:00/0	00:00/00.00	00:00/00.00	0:00	00:00/00.00	00:00/0	00:00/0

5-3.4

GOVERNMENT TORT CLAIM

RECOMMENDED ACTION

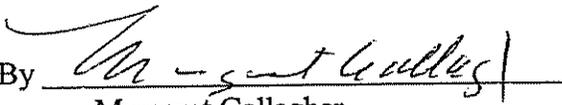
TO: Board of Directors

FROM: District Counsel

RE: Claim of: Marquez, Jackie Lynn Received: 01/06/05 Claim #: 05-0002
Date of Incident: 01/05/05 Occurrence Report No.: SC 01-05-04

In regard to the above-referenced Claim, this is to recommend that the Board of Directors take the following action:

- 1. Reject the claim entirely.
- 2. Deny the application to file a late claim.
- 3. Grant the application to file a late claim.
- 4. Reject the claim as untimely filed.
- 5. Reject the claim as insufficient.
- 6. Allow the claim in full.
- 7. Allow the claim in part, in the amount of \$ _____ and reject the balance.

By 
Margaret Gallagher
DISTRICT COUNSEL

Date: _____

I, Cindi Thomas, do hereby attest that the above Claim was duly presented to and the recommendations were approved by the Santa Cruz Metropolitan Transit District's Board of Directors at the meeting of January 28, 2005.

By _____
Cindi Thomas
RECORDING SECRETARY

Date: _____

MG/lg
Attachment(s)

5-4.1

CLAIM AGAINST THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

(Pursuant to Section 910 et Seq., Government Code)

Claim # ~~5001-05-04~~ 05-0002

TO: BOARD OF DIRECTORS, Santa Cruz Metropolitan Transit District

ATTN: Secretary to the Board of Directors
370 Encinal Street, Suite 100
Santa Cruz, CA 95060

1. Claimant's Name: Jackie Lynn Marawez
115 Coral Street Santa Cruz 95060
Claimant's Address/Post Office Box: _____

Mailroom same as above Riverstreet Shelter
Claimant's Phone Number: message 458-6030 469-4673

2. Address to which notices are to be sent: c/o Mary Ann Balkcom
15830 Greenwood Surprise, Arizona 85374

3. Occurrence: _____

Date: 1-5-05 Time: 11:00 Place: Emiline

Circumstances of occurrence or transaction giving rise to claim: Bus on highway
1 Driver slammed brakes I went left to right
hit metal support was hurt on lower back &
cervical & tailbone slight middle fingers.

4. General description of indebtedness, obligation, injury, damage, or loss incurred so far as is known: Bus trip from Arizona bill unpaid
of 1,500 in home injury food shelter
phone bills. clothing.

5. Name or names of public employees or employees causing injury, damage, or loss, if known: Metro shelter, emiline,

6. Amount claimed now \$ 2,500
Estimated amount of future loss, if known \$ 2,500
TOTAL \$ 5,000

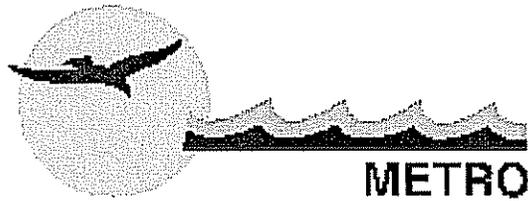
7. Basis of above computations: _____

J. Marawez
CLAIMANT'S SIGNATURE (or Company
Representative or Parent of Minor Claimant)

1-6-05
DATE

Note: Claim must be presented to the Secretary to the Board of Directors, Santa Cruz
Metropolitan Transit District
Supervisor & Bus driver told us to write
that we didn't need an ambulance. at

5-4-2



Agenda

Metro Advisory Committee

6:00 pm
January 19, 2005
920 Pacific Avenue
Santa Cruz, California

- I. Roll Call
- II. Agenda Additions/ Deletions
- III. Oral/Written Communication
- IV. Consideration of Minutes of December 15, 2004 MAC Meeting
- V. Discussion of UCSC and Cabrillo College Student Orientation to METRO
- V. Fold-Up Bikes on Buses
- VI. Discussion of MAC Meeting Times
- VII. Discussion of Recruitment to MAC
- VIII. MAC Member Outreach to METRO Board of Directors
- IX. Feasibility of Reduced Fares for METRO Service
- X. Communications to METRO General Manager
- XI. Communications to METRO Board of Directors
- XII. Items for Next Meeting Agenda

5-5.1

XIII. Adjournment

Next Meeting: Wednesday February 16, 2005 @ 6:00 pm
Santa Cruz Metro Center Conference Room
Santa Cruz Metro Center

5-5.2

REVISED

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

Minutes- METRO Advisory Committee (MAC)

November 17, 2004

A Regular Meeting of the METRO Advisory Committee (MAC) met on Wednesday, November 17, 2004 at the METRO Center Conference Room, 920 Pacific Avenue, Santa Cruz, CA.

At 6:05p.m. METRO Assistant General Manager, Mark Dorfman, announced that since MAC Chair Kanoa Dynek was absent and there was a quorum, the committee could proceed with their meeting. Vice-Chair Marcelin-Sampson called the meeting to order and asked for the roll call.

1. ROLL CALL:

MEMBERS PRESENT

Dan Alper (arrived after roll call)
Norm Hagen
Jeff Le Blanc
Paul Marcelin-Sampson, Vice-Chair
Matthew Melzer
Stuart Rosenstein
Leslie Lesley Wright (arrived after roll call)
Robert Yount

MEMBERS ABSENT

Kanoa Dynek
James Sheldon

VISITORS PRESENT

Jeff North, UTU

STAFF PRESENT

Bryant Baehr, Operations Manager
Mark Dorfman, Assistant General Manager
Margaret Gallagher, District Counsel

2. AGENDA ADDITIONS/DELETIONS

None.

3. ORAL/WRITTEN COMMUNICATIONS

Oral: Stuart Rosenstein inquired as to the status of the Measure J survey. Mark Dorfman advised that a survey would have been performed if Measure J failed but received 55% of the vote. To his knowledge a survey was not performed.

4. CONSIDERATION OF MINUTES OF OCTOBER 20, 2004 MAC MEETING

Stuart Rosenstein advised MAC that relative to Item 14, "Discussion of Surfboards on Buses," his comments were directed toward all bus passengers.

ACTION: MOTION: NORM HAGEN SECOND: ROBERT YOUNT

5-5.3

REVISED

Minutes– METRO Advisory Committee
November 17, 2004
Page 2

ACCEPT AND FILE MINUTES OF OCTOBER 20, 2004 MAC MEETING WITH THE CORRECTION TO STUART ROSENSTEIN'S COMMENTS RELATIVE TO ITEM 14.¹

Motion passed with Norm Hagen, Jeff Le Blanc, Paul Marcelin-Sampson, Matthew Melzer, Stuart Rosenstein and Robert Yount voting for; and Dan Alper, Kanoa Dynek, James Sheldon and Lesley Wright being absent.

In the interest of time, Vice-Chair Marcelin-Sampson deferred Item #13 to a later date and limited all remaining items to 11 minutes.

5. PARATRANSIT TASK FORCE UPDATE

Stuart Rosenstein shared the Paratransit Task Force agenda and minutes and he advised MAC of what he learned when he attended the recent meeting. He provided statistics as to the amount of calls that were received and the amount of rides that were given during METRO's first week of operating ParaCruz. He reported other items of interest including information relative to ride payment procedures as well as the goals of the Task Force. He asked that MAC contact him with any comments or questions regarding the Task Force. Norm Hagen stated that Paratransit Task Force agendas are available through the RTC website.

DAN ALPER ARRIVED AT THIS TIME

LESLEY WRIGHT ARRIVED AT THIS TIME

6. CONSIDERATION OF METRO'S NO SMOKING POLICY

Paul Marcelin-Sampson suggested that MAC discuss Robert Yount's draft no smoking policy. Robert Yount recounted his experience with second hand smoke. He asked Margaret Gallagher for her legal opinion as to how bus operators should manage people who smoke at bus stops. Ms. Gallagher said that METRO rules state that bus operators should facilitate transportation. She said METRO rules state that a bus operator's involvement with smoking policy violators is limited to placing a telephone call to their supervisor to report the violation. Stuart Rosenstein suggested that METRO look at ways to publicize the no smoking policy. Stuart Rosenstein suggested that it would be a good idea to verify when METRO's no smoking policy was enacted and then use that anniversary as a method of publicizing it. Discussion ensued as to various avenues to publicize METRO'S no smoking policy. Robert Yount inquired as to whether or not he could place no smoking posters on METRO buses. Margaret Gallagher said she would look into METRO's advertising policy. Vice-Chair Paul Marcelin-Sampson advised that METRO's no smoking policy will be discussed again at the next MAC meeting.

ACTION: MOTION: MATHEW MELZER SECOND: ROBERT YOUNT

MAC RECOMMENDS THAT METRO PREPARE SIGNAGE WITH RESPECT TO METRO'S NO SMOKING POLICY.

Motion passed with Dan Alper, Norm Hagen, Jeff Le Blanc, Paul Marcelin-Sampson, Matthew Melzer, Stuart Rosenstein, Robert Yount , and Lesley Wright voting for; and with Kanoa Dynek and James Sheldon being absent.

¹ This correction was made at Page 4 of the October Minutes

5-5.4

REVISED

Minutes– METRO Advisory Committee
November 17, 2004
Page 3

7. DISCUSSION OF BIKES AND SURFBOARDS ON BUSES

Dan Alper stated that he is waiting for additional information regarding bikes on buses.

ACTION: MOTION: NORM HAGEN SECOND: PAUL MARCELIN-SAMPSON

TABLE THIS MATTER UNTIL NEXT MONTH.

Motion passed with Dan Alper, Norm Hagen, Jeff Le Blanc, Matthew Melzer, Paul Marcelin-Sampson, Stuart Rosenstein, Robert Yount, and Lesley Wright voting for; and with Kanoa Dynek and James Sheldon being absent.

8. Discussion of Attendance at MAC Meetings

Discussion ensued regarding attendance at meetings by MAC members. Also discussed were the demographics as well as diversity of MAC membership. Mark Dorfman presented an oral history of MAC. Matthew Melzer suggested posting signs at METRO bus shelters to publicize MAC membership. Margaret Gallagher read from METRO'S by-laws relative to MAC appointments. Jeff Le Blanc suggested that each MAC member discuss broader representation with their respective Board member. Mark Dorfman suggested that MAC members suggest potential MAC members to the METRO board.

Jeff North stated that he needed to leave the meeting, but he would like to discuss UCSC student orientation at the next MAC meeting.

9. Deployment of Bus Shelters

Jeff Le Blanc updated MAC on MASTF's current involvement in bus shelter deployment. He suggested that MAC members contact MASTF with specific bus shelter issues. As an alternative, he suggested that MAC present their concerns to him in writing and he can in turn present them to MASTF. Mark Dorfman updated MAC on current issues relating to bus shelters.

10. Discussion of Size of Buses Used on Route 20

Matthew Melzer relayed his experience as a METRO passenger at the UCSC campus. MAC discussed ways METRO could provide optimal service to UCSC students. Mark Dorfman stated that he would look into using 40' buses on campus routes as opposed to 35' buses. Stuart Rosenstein suggested METRO embark on outreach to foster communication with UCSC students. Matthew Melzer stated that he could be a liaison with UCSC through their group "TAPTALK." Mark Dorfman provided information as to how USCS's shuttle bus system operates. He stated that UCSC's student ridership is among the highest in the US. He stated that he is aware that the students who use the UCSC shuttle bus service are very satisfied with the TAPS operation. Mr. Dorfman stated that he would be willing to speak with Larry Pageler at TAPS to invite him to attend MAC's January meeting.

11. Discusssion of Talking Bus External Volume Issues

Bryant Baehr provided information with regard to ADA statutes and the talking bus. He also discussed the technical aspect of the talking bus. He advised that several people who live near bus stops are annoyed by the sounds of the talking bus. He advised that METRO adjusted the volume on the talking buses as recommendation of an audiometric expert; but the

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REVISED

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November 17, 2004
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recommended volume levels were not appropriate at all the stops. METRO is now exploring what can be done to create the best possible solution.

12. Discussion of Helping People to Find Their Bus at METRO Center

Paul Marcelin-Sampson suggested that buses be assigned to specific lanes at specific times at METRO Center. Mark Dorfman commented that although lane assignments are a good idea in theory, the idea would not be practical at the present time. Mr. Dorfman offered several suggestions as to how various systems could work in the future, including GPS systems and movable electronic signs. Paul Marcelin-Sampson relayed his experience at DMV and how they manage their customers with television monitors. He suggested the use of an FM radio broadcast to allow passengers to listen to where to catch the bus. Jeff Le Blanc discussed the use of infrared signals to assist vision-impaired people to find their bus. Bryant Baehr said he would look into this matter further.

15. COMMUNICATIONS TO METRO GENERAL MANAGER

None.

16. COMMUNICATIONS TO THE METRO BOARD OF DIRECTORS

Matthew Melzer stated that he will not be able to attend next month's meeting, but will be present at the January MAC meeting.

17. ITEMS FOR NEXT MEETING AGENDA

- Discussion of Size of Buses Used on Route 20
- Consideration of METRO's No Smoking Policy
- Discussion of Bicycles and Surfboards on Buses
- Receive Information Regarding Comparability of Labor Costs to Other Bay Area Transit Systems
- UCSC and Cabrillo College Student Orientation to METRO

ADJOURN

There being no further business, Vice-Chair Marcelin-Sampson thanked everyone for their participation and he adjourned the meeting at 7:59 p.m.

Respectfully submitted,



Debi Prince
Administrative Secretary

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SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

DATE: January 28, 2005
TO: Board of Directors
FROM: Elisabeth Ross, Finance Manager
SUBJECT: MONTHLY BUDGET STATUS REPORT FOR NOVEMBER 2004, AND APPROVAL OF BUDGET TRANSFERS

I. RECOMMENDED ACTION

Staff recommends that the Board of Directors approve the budget transfers for the period of December 1 – 31, 2004.

II. SUMMARY OF ISSUES

- Operating revenue for the year to date totals \$14,627,567 or \$252,634 over the amount of revenue expected to be received during the first five months of the fiscal year, based on the budget revised in December.
- Total operating expenses for the year to date, in the amount of \$12,561,536, are at 37.9% of the revised budget.
- A total of \$2,623,308 has been expended through November 30th for the FY 04-05 Capital Improvement Program.

III. DISCUSSION

An analysis of the District's budget status is prepared monthly in order to apprise the Board of Directors of the District's actual revenues and expenses in relation to the adopted operating and capital budgets for the fiscal year. The attached monthly revenue and expense report represents the status of the District's FY 04-05 budget as of November 30, 2004. The fiscal year is 41.7% elapsed.

A. Operating Revenues

Revenues are \$252,634 over the amount projected to be received for the period. Total passenger revenue is \$15,087 under budget projections. Sales tax revenue is over budget since the September wrap-up payment was higher than expected. Variances are explained in the notes following the report.

B. Operating Expenses

Operating expenses for the year to date total \$12,561,536 or 37.9% of the revised budget, with 41.7% of the year elapsed. Variances are explained in the notes following the report.

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C. Capital Improvement Program

For the year to date, a total of \$2,623,308 has been expended on the Capital Improvement Program. The largest expenditure was for the MetroBase project in the amount of \$1,963,856.

IV. FINANCIAL CONSIDERATIONS

Approval of the budget transfers will increase some line item expenses and decrease others. Overall, the changes are expense-neutral.

V. ATTACHMENTS

Attachment A: Revenue and Expense Report for November 2004, and Budget Transfers

MONTHLY REVENUE AND EXPENSE REPORT
 OPERATING REVENUE - NOVEMBER 2004

Attachment **A**

Operating Revenue	FY 04-05 Budgeted for Month	FY 04-05 Actual for Month	FY 04-05 Budgeted YTD	FY 03-04 Actual YTD	FY 04-05 Actual YTD	YTD Variance from Budgeted	
Passenger Fares	\$ 289,491	\$ 289,599	\$ 1,686,363	\$ 1,639,952	\$ 1,505,610	\$ (180,753)	
Paratransit Fares	\$ 25,663	\$ 15,783	\$ 108,240	\$ 100,757	\$ 105,285	\$ (2,955)	
Special Transit Fares	\$ 214,155	\$ 240,484	\$ 728,295	\$ 701,976	\$ 850,470	\$ 122,175	
Highway 17 Revenue	\$ 72,437	\$ 91,129	\$ 394,566	\$ 276,299	\$ 441,012	\$ 46,446	
<i>Subtotal Passenger Rev</i>	\$ 601,746	\$ 636,995	\$ 2,917,464	\$ 2,718,984	\$ 2,902,377	\$ (15,087)	See Note 1
Advertising Income	\$ -	\$ 7,865	\$ -	\$ 17,509	\$ 29,345	\$ 29,345	See Note 2
Commissions	\$ 617	\$ 559	\$ 3,083	\$ 3,287	\$ 3,113	\$ 30	
Rent Income	\$ 13,545	\$ 22,272	\$ 67,277	\$ 60,617	\$ 117,179	\$ 49,902	See Note 3
Interest - General Fund	\$ 23,014	\$ 34,341	\$ 121,550	\$ 121,205	\$ 151,394	\$ 29,844	See Note 4
Non-Transportation Rev	\$ 500	\$ 297	\$ 2,500	\$ 806	\$ 1,317	\$ (1,183)	
Sales Tax Income	\$ 1,464,200	\$ 1,464,200	\$ 6,431,587	\$ 6,373,544	\$ 6,591,370	\$ 159,783	See Note 5
TDA Funds	\$ -	\$ -	\$ 1,438,313	\$ 1,348,222	\$ 1,438,313	\$ -	
FTA Op Asst - Sec 5307	\$ -	\$ -	\$ 2,950,231	\$ 2,804,435	\$ 2,950,231	\$ -	
FTA Op Asst - Sec 5311	\$ -	\$ -	\$ 92,928	\$ 65,704	\$ 92,928	\$ -	
FTA Op Asst Advance	\$ -	\$ -	\$ 350,000	\$ -	\$ 350,000	\$ -	
FY 03-04 Carryover	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Transfer from Reserves	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Transfer from Insurance Reserves	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Transfer - Proj Mgr	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Operating Revenue	\$ 2,103,622	\$ 2,166,529	\$ 14,374,933	\$ 13,514,313	\$ 14,627,567	\$ 252,634	

**MONTHLY REVENUE AND EXPENSE REPORT
OPERATING EXPENSE SUMMARY - NOVEMBER 2004**

	FY 04-05 Final Budget	FY 04-05 Revised Budget	FY 03-04 Expended YTD	FY 04-05 Expended YTD	Percent Expended of Budget	
PERSONNEL ACCOUNTS						
Administration	\$ 917,905	\$ 899,262	\$ 308,860	\$ 404,972	45.0%	See Note 6
Finance	\$ 552,664	\$ 558,989	\$ 200,893	\$ 212,623	38.0%	
Customer Service	\$ 490,027	\$ 490,238	\$ 185,411	\$ 175,432	35.8%	
Human Resources	\$ 353,462	\$ 342,662	\$ 134,386	\$ 93,858	27.4%	See Note 7
Information Technology	\$ 438,670	\$ 408,613	\$ 174,453	\$ 154,433	37.8%	
District Counsel	\$ 376,655	\$ 376,795	\$ 126,481	\$ 134,506	35.7%	
Facilities Maintenance	\$ 1,050,695	\$ 1,051,186	\$ 398,577	\$ 406,254	38.6%	
Paratransit Program	\$ 236,906	\$ 1,723,364	\$ 82,906	\$ 283,471	16.4%	See Note 8
Operations	\$ 1,921,272	\$ 1,907,907	\$ 746,492	\$ 780,282	40.9%	
Bus Operators	\$ 12,661,130	\$ 12,666,742	\$ 4,736,146	\$ 4,989,874	39.4%	
Fleet Maintenance	\$ 4,046,043	\$ 3,993,125	\$ 1,426,277	\$ 1,474,218	36.9%	
Retired Employees/COBRA	\$ 955,033	\$ 1,020,679	\$ 305,575	\$ 325,967	31.9%	
Total Personnel	\$ 24,000,462	\$ 25,439,562	\$ 8,826,456	\$ 9,435,891	37.1%	
NON-PERSONNEL ACCOUNTS						
Administration	\$ 568,070	\$ 568,070	\$ 207,699	\$ 229,514	40.4%	
Finance	\$ 899,457	\$ 899,413	\$ 330,736	\$ 335,747	37.3%	
Customer Service	\$ 92,060	\$ 96,060	\$ 45,217	\$ 52,632	54.8%	See Note 9
Human Resources	\$ 31,603	\$ 34,303	\$ 8,965	\$ 16,876	49.2%	See Note 10
Information Technology	\$ 92,235	\$ 128,235	\$ 25,107	\$ 34,203	26.7%	
District Counsel	\$ 11,340	\$ 11,340	\$ 5,181	\$ 2,736	24.1%	
Risk Management	\$ 254,870	\$ 254,870	\$ 43,887	\$ 24,537	9.6%	
Facilities Maintenance	\$ 449,100	\$ 461,100	\$ 155,941	\$ 140,816	30.5%	
Paratransit Program	\$ 2,743,186	\$ 1,545,986	\$ 908,243	\$ 914,267	59.1%	See Note 11
Operations	\$ 578,730	\$ 578,774	\$ 130,613	\$ 172,014	29.7%	
Bus Operators	\$ 7,000	\$ 7,000	\$ 2,619	\$ 67	1.0%	
Fleet Maintenance	\$ 2,868,265	\$ 2,871,665	\$ 963,202	\$ 1,202,206	41.9%	
Op Prog/SCCIC	\$ 300	\$ 300	\$ 10	\$ 30	10.0%	
Prepaid Expense	\$ -	\$ -	\$ 2,354	\$ -	0.0%	
Total Non-Personnel	\$ 8,596,216	\$ 7,457,116	\$ 2,829,773	\$ 3,125,644	41.9%	
Subtotal Operating Expense	\$ 32,596,678	\$ 32,896,678	\$ 11,656,229	\$ 12,561,536	38.2%	
One-Time Paratransit Expenses	\$ 350,000	\$ 268,500	\$ -	\$ -	0.0%	
Contingency Fund	\$ 300,000	\$ -	\$ -	\$ -	0.0%	
Total Operating Expense	\$ 33,246,678	\$ 33,165,178	\$ 11,656,229	\$ 12,561,536	37.9%	
YTD Operating Revenue Over YTD Expense				\$ 2,066,031		

**CONSOLIDATED OPERATING EXPENSE
NOVEMBER 2004**

	FY 04-05 Final Budget	FY 04-05 Revised Budget	FY 03-04 Expended YTD	FY 04-05 Expended YTD	% Exp YTD of Budget	
LABOR						
Operators Wages	\$ 6,753,430	\$ 7,400,402	\$ 2,381,326	\$ 2,657,735	35.9%	
Operators Overtime	\$ 1,020,350	\$ 1,060,350	\$ 470,754	\$ 413,535	39.0%	
Other Salaries & Wages	\$ 6,173,059	\$ 6,127,448	\$ 2,214,234	\$ 2,342,247	38.2%	
Other Overtime	\$ 165,700	\$ 165,908	\$ 114,093	\$ 67,868	40.9%	
	\$ 14,112,539	\$ 14,754,108	\$ 5,180,407	\$ 5,481,384	37.2%	
FRINGE BENEFITS						
Medicare/Soc Sec	\$ 161,240	\$ 176,478	\$ 57,965	\$ 62,040	35.2%	
PERS Retirement	\$ 1,510,704	\$ 1,600,993	\$ 417,651	\$ 579,338	36.2%	
Medical Insurance	\$ 2,908,041	\$ 3,288,358	\$ 1,016,017	\$ 1,171,500	35.6%	
Dental Plan	\$ 460,743	\$ 520,945	\$ 158,524	\$ 169,840	32.6%	
Vision Insurance	\$ 125,100	\$ 140,610	\$ 47,974	\$ 52,792	37.5%	
Life Insurance	\$ 61,065	\$ 68,330	\$ 17,324	\$ 8,962	13.1%	
State Disability Ins	\$ 217,937	\$ 260,616	\$ 51,621	\$ 75,968	29.1%	
Long Term Disability Ins	\$ 237,221	\$ 250,467	\$ 83,327	\$ 92,673	37.0%	
Unemployment Insurance	\$ 71,243	\$ 91,750	\$ 271	\$ 4,646	5.1%	See Note 12
Workers Comp	\$ 1,473,634	\$ 1,489,828	\$ 747,249	\$ 602,300	40.4%	
Absence w/ Pay	\$ 2,628,861	\$ 2,761,799	\$ 1,038,374	\$ 1,123,186	40.7%	
Other Fringe Benefits	\$ 32,135	\$ 35,281	\$ 9,753	\$ 11,259	31.9%	
	\$ 9,887,923	\$ 10,685,455	\$ 3,646,049	\$ 3,954,507	37.0%	
SERVICES						
Acctng/Admin/Bank Fees	\$ 311,700	\$ 311,700	\$ 74,656	\$ 93,390	30.0%	
Prof/Legis/Legal Services	\$ 389,680	\$ 319,280	\$ 124,621	\$ 99,644	31.2%	
Temporary Help	\$ -	\$ 37,800	\$ -	\$ 13,947	36.9%	
Custodial Services	\$ 83,800	\$ 95,800	\$ 31,037	\$ 30,399	31.7%	
Uniforms & Laundry	\$ 37,500	\$ 39,000	\$ 10,824	\$ 26,300	67.4%	See Note 13
Security Services	\$ 392,555	\$ 392,555	\$ 69,853	\$ 106,975	27.3%	
Outside Repair - Bldgs/Eqmt	\$ 186,546	\$ 191,796	\$ 56,349	\$ 49,112	25.6%	
Outside Repair - Vehicles	\$ 274,563	\$ 344,383	\$ 130,356	\$ 124,125	36.0%	
Waste Disp/Ads/Other	\$ 86,159	\$ 89,559	\$ 16,627	\$ 47,869	53.4%	See Note 14
	\$ 1,762,503	\$ 1,821,873	\$ 514,324	\$ 591,760	32.5%	
CONTRACT TRANSPORTATION						
Contract Transportation	\$ 100	\$ 100	\$ -	\$ -	0.0%	
Paratransit Service	\$ 2,606,136	\$ 1,150,000	\$ 849,979	\$ 805,902	70.1%	See Note 15
	\$ 2,606,236	\$ 1,150,100	\$ 849,979	\$ 805,902	70.1%	
MOBILE MATERIALS						
Fuels & Lubricants	\$ 1,560,314	\$ 1,673,754	\$ 461,402	\$ 662,954	39.6%	
Tires & Tubes	\$ 164,000	\$ 165,000	\$ 30,188	\$ 68,949	41.8%	
Other Mobile Supplies	\$ 6,000	\$ 7,500	\$ 2,040	\$ 3,182	42.4%	See Note 16
Revenue Vehicle Parts	\$ 344,000	\$ 349,000	\$ 165,660	\$ 174,199	49.9%	See Note 17
	\$ 2,074,314	\$ 2,195,254	\$ 659,289	\$ 909,284	41.4%	

**CONSOLIDATED OPERATING EXPENSE
NOVEMBER 2004**

	FY 04-05 Final Budget	FY 04-05 Revised Budget	FY 03-04 Expended YTD	FY 04-05 Expended YTD	% Exp YTD of Budget	
OTHER MATERIALS						
Postage & Mailing/Freight	\$ 23,174	\$ 29,824	\$ 6,175	\$ 11,410	38.3%	
Printing	\$ 68,925	\$ 73,720	\$ 33,078	\$ 32,026	43.4%	See Note 18
Office/Computer Supplies	\$ 51,284	\$ 59,884	\$ 19,113	\$ 36,406	60.8%	See Note 19
Safety Supplies	\$ 18,375	\$ 18,875	\$ 7,265	\$ 4,151	22.0%	
Cleaning Supplies	\$ 56,100	\$ 56,350	\$ 10,688	\$ 12,886	22.9%	
Repair/Maint Supplies	\$ 65,000	\$ 65,000	\$ 20,335	\$ 21,696	33.4%	
Parts, Non-Inventory	\$ 42,000	\$ 43,000	\$ 9,173	\$ 16,591	38.6%	
Tools/Tool Allowance	\$ 9,600	\$ 10,000	\$ 2,130	\$ 4,080	40.8%	
Promo/Photo Supplies	\$ 11,645	\$ 11,945	\$ 646	\$ 2,373	19.9%	
	\$ 346,103	\$ 368,598	\$ 108,604	\$ 141,620	38.4%	
UTILITIES	\$ 310,305	\$ 340,105	\$ 111,271	\$ 107,948	31.7%	
CASUALTY & LIABILITY						
Insurance - Prop/PL & PD	\$ 582,000	\$ 582,000	\$ 254,240	\$ 240,329	41.3%	
Settlement Costs	\$ 150,000	\$ 150,000	\$ 31,282	\$ 18,273	12.2%	
Repairs to Prop	\$ -	\$ -	\$ (5,908)	\$ (13,800)	0.0%	See Note 20
Prof/Other Services	\$ -	\$ -	\$ -	\$ -	0.0%	
	\$ 732,000	\$ 732,000	\$ 279,614	\$ 244,802	33.4%	
TAXES	\$ 48,594	\$ 49,194	\$ 20,578	\$ 22,581	45.9%	See Note 21
MISC EXPENSES						
Dues & Subscriptions	\$ 51,176	\$ 51,176	\$ 17,690	\$ 17,417	34.0%	
Media Advertising	\$ -	\$ -	\$ 40	\$ 9,891	0.0%	
Employee Incentive Program	\$ 7,820	\$ 7,820	\$ 4,480	\$ 1,649	21.1%	
Training	\$ 5,900	\$ 6,200	\$ 4,434	\$ 495	8.0%	
Travel	\$ 19,915	\$ 20,015	\$ 7,147	\$ 1,569	7.8%	
Other Misc Expenses	\$ 17,900	\$ 18,100	\$ 6,783	\$ 6,087	33.6%	
	\$ 102,711	\$ 103,311	\$ 40,574	\$ 37,109	35.9%	
OTHER EXPENSES						
Leases & Rentals	\$ 613,450	\$ 696,681	\$ 245,540	\$ 264,638	38.0%	
	\$ 613,450	\$ 696,681	\$ 245,540	\$ 264,638	38.0%	
One-Time Paratransit Exp	\$ 350,000	\$ 268,500	\$ -	\$ -		
Contingency Fund	\$ 300,000	\$ -	\$ -	\$ -		
Total Operating Expense	\$ 33,246,678	\$ 33,165,178	\$ 11,656,229	\$ 12,561,535	37.9%	

**MONTHLY REVENUE AND EXPENSE REPORT
FY 04-05 CAPITAL IMPROVEMENT PROGRAM**

CAPITAL PROJECTS	Program Budget	Expended in November	YTD Expended
Grant Funded Projects			
MetroBase	\$ 16,000,000	\$ 15,335	\$ 1,963,856
Urban Bus Replacement	\$ 1,675,432	\$ 461,550	\$ 473,502
Short Range Transit Plan	\$ 100,000		
	\$ 17,775,432		
District Funded Projects			
Bus Stop Imprvmnts/Bus Shelter Projects	\$ 49,200		\$ 5,515
IT Projects including GIRO carryover	\$ 15,200	\$ (200)	\$ 11,990
Facilities Repairs & Improvements	\$ 26,500		
Non-Revenue Vehicle Replacement	\$ 195,000		
Office Equipment	\$ 33,900		\$ 20,081
Diagnostic Scanner	\$ 3,000	\$ 2,793	\$ 15,648
ParaCruz Equipment	\$ 81,500	\$ 31,662	\$ 132,716
	\$ 404,300		
TOTAL CAPITAL PROJECTS	\$ 18,179,732	\$ 511,140	\$ 2,623,308
CAPITAL FUNDING SOURCES			
	Budget	Received in November	YTD Received
Federal Capital Grants	\$ 14,200,345	\$ -	\$ 1,241,214
State/Local Capital Grants	\$ -	\$ -	\$ -
STA Funding	\$ 982,569	\$ -	\$ 215,249
Transfer from Operating Budget	\$ 81,500	\$ -	\$ -
Bus Stop Improvement Reserves	\$ 39,200	\$ -	\$ -
District Reserves	\$ 2,876,118	\$ 511,140	\$ 1,166,846
TOTAL CAPITAL FUNDING	\$ 18,179,732	\$ 511,140	\$ 2,623,308

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**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
NOTES TO REVENUE AND EXPENSE REPORT**

1. Passenger fares (farebox and pass sales) are \$180,753 or 11% under the final budget amount for the year to date. Paratransit fares are \$2,955 or 3% under budget due to fewer riders for the year to date than projected. Special transit fares (contracts) are \$122,175 or 17% over the budgeted amount. Highway 17 Express revenue is \$46,446 or 12% over the year to date budgeted amount. Together, all four passenger revenue accounts are under the budgeted amount for the first five months of the fiscal year by a net \$15,087 or 0.5%.
2. Advertising income is \$29,345 over budget due to sales of exterior ads on buses. Sales had been projected to begin in January 2005. The revenue will be used to offset program start-up costs.
3. Rent income is \$49,902 over budget due to payment of temporary rent by A Tool Shed pending relocation.
4. Interest income is \$29,844 over budget due to higher interest rates, and a slightly higher treasury balance than projected for the period.
5. Sales tax income is \$159,783 over budget for the first five months since the September wrap-up payment was higher than anticipated. For the April-June 2004 sales period, sales tax revenue for the District was up 6.3% over the previous year, while the budget projected a 2.0% increase.
6. Administration personnel expense is at 45.0% of the budget due to high workers' comp expenses during the period.
7. Human Resources personnel expense is only at 27.4% of the budget due to a \$28,478 workers' comp credit in July.
8. Paratransit program personnel expense is only at 16.4% of the budget since hiring of additional ParaCruz staff occurred in the third month of the fiscal year.
9. Customer Service non-personnel expense is at 54.8% of the budget due to higher printing and graphics expenses than anticipated for the fall schedule.
10. Human Resources non-personnel expense is at 49.2% of the budget due to recruitment and hiring costs for the ParaCruz department.
11. Paratransit program non-personnel expense is at 59.1% of the budget due to payment to Community Bridges for contract services from July to October 2004. As of November 1, 2004, the major costs shifted to personnel expenses (see Note 8.)
12. Unemployment insurance is only at 5.1% of the budget because the tax is paid on wages beginning in January and the cap has been reached for most employees by this point in the calendar year.
13. Uniforms and laundry expense is at 67.4% of the budget due to start-up ParaCruz expenses.

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14. Waste disposal/ads/other is at 53.4% of the budget due to expenses associated with the sale of the Sakata property.
15. Contract paratransit service is at 70.1% of the budget since most of this account covers the Community Bridges billings for July to October 2004. The balance will be used to pay for contract taxicab services.
16. Other mobile supplies expense is at 42.4% of the budget due to volume purchases.
17. Revenue vehicle parts are at 49.9% of the budget since this account fluctuates from month to month depending on the parts needed for repairs.
18. Printing is at 43.4% of the budget due to printing of route stickers for the fall schedule, and higher costs for printing Headways.
19. Office/computer supplies are at 60.8% of the budget due to volume purchase of IT supplies and ParaCruz start-up costs.
20. Repairs to property is a casualty and liability account to which repairs to District vehicles and property are charged when another party is liable for the damage. All collections made from other parties for property repair are applied to this account to offset the District's repair costs.
21. Taxes are at 45.9% of the budget due to payment of annual tax assessments for the Scotts Valley Transit Center.

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FY 04-05 BUDGET TRANSFERS
12/1/04-12/31/04

	ACCOUNT #	ACCOUNT TITLE	AMOUNT
TRANSFER # 05-008			
TRANSFER FROM:	501021-1400	Other Salaries	\$ (208)
TRANSFER TO:	501023-1400	Other Overtime	\$ 208
REASON:	To cover overtime expenses in the Human Resources Department.		

TRANSFER # 05-009			
TRANSFER FROM:	501021-1500	Other Salaries	\$ (33,000)
TRANSFER TO:	503041-1500	Temporary Help	\$ 33,000
REASON:	To cover temporary help in the IT Department during recruitment process.		

TRANSFER # 05-010			
TRANSFER FROM:	50299-1400	Other Fringe Benefits	\$ (10,800)
TRANSFER TO:	502999-1100	Other Fringe Benefits	\$ 316
	502999-1200	Other Fringe Benefits	\$ 211
	502999-1300	Other Fringe Benefits	\$ 211
	502999-1500	Other Fringe Benefits	\$ 140
	502999-1700	Other Fringe Benefits	\$ 140
	502999-2200	Other Fringe Benefits	\$ 491
	502999-3100	Other Fringe Benefits	\$ 1,258
	502999-3200	Other Fringe Benefits	\$ 702
	502999-3300	Other Fringe Benefits	\$ 5,612
	502999-4100	Other Fringe Benefits	\$ 1,719
			<u>\$ 10,800</u>
REASON:	To allocate EAP costs by department.		

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FY 04-05 BUDGET TRANSFERS

12/1/04-12/31/04

	ACCOUNT #	ACCOUNT TITLE	AMOUNT
TRANSFER # 05-011			
TRANSFER FROM:	503406-3100	Contract Transportation	\$ (1,456,136)
	503031-3100	Professional/Technical	\$ (70,400)
		Contingency Fund	\$ (300,000)
			<u>\$ (1,826,536)</u>
TRANSFER TO:	501011-3100	Bus Operator Pay	\$ 646,972
	501013-3100	Bus Operator OT	\$ 40,000
	501021-3100	Other Salaries	\$ 55,486
	502011-3100	Medicare/SS	\$ 15,237
	502021-3100	Retirement	\$ 90,291
	502031-3100	Medical Ins.	\$ 336,824
	502041-3100	Dental Ins.	\$ 52,819
	502045-3100	Vision Ins.	\$ 12,990
	502051-3100	Life Ins.	\$ 5,872
	502060-3100	SDI	\$ 42,678
	502061-3100	LTD Ins.	\$ 13,247
	502071-3100	SUI	\$ 20,506
	502081-3100	Workers' Comp	\$ 16,194
	502101-3100	Holiday Pay	\$ 15,427
	502103-3100	Floating Holiday	\$ 2,700
	502109-3100	Sick Leave	\$ 44,254
	502111-3100	Vacation	\$ 66,057
	502121-3100	Other Paid Absence	\$ 4,500
	502251-3100	Phys Exam Renewal	\$ 1,650
	502253-3100	Driver License Renewal	\$ 1,100
	502999-3100	Other Fringe Benefits	\$ 396
	503162-3100	Uniforms/Laundry	\$ 1,500
	503352-3100	Equip Repair - Out	\$ 4,150
	503353-3100	Rev Veh Repair - Out	\$ 69,820
	504011-3100	Fuels & Lubricants	\$ 17,500
	504012-3100	Rev Veh Fuel	\$ 95,940
	504021-3100	Tires & Tubes	\$ 1,000
	504161-3100	Other Mobile Supplies	\$ 1,500
	504191-3100	Rev Veh Parts	\$ 5,000
	504205-3100	Freight Out	\$ 150
	504211-3100	Postage & Mailing	\$ 6,500
	504215-3100	Printing	\$ 1,295
	504311-3100	Office Supplies	\$ 9,000
	504315-3100	Safety Supplies	\$ 500
	504317-3100	Cleaning Supplies	\$ 250
	504421-3100	Parts & Supplies	\$ 1,000
	504511-3100	Small Tools	\$ 100
	504515-3100	Employee Tools	\$ 300
	505011-3100	Gas & Electric	\$ 10,000
	505021-3100	Water/Sewer/Garbage	\$ 3,000
	505031-3100	Telecommunications	\$ 16,800
	507201-3100	Licenses & Permits	\$ 600
	509125-3100	Other Misc. Expense	\$ 200
	512011-3100	Facility Lease	\$ 82,931
	512061-3100	Equipment Rental	\$ 300
	503161-2200	Custodial Services	\$ 12,000
			<u>\$ 1,826,536</u>

REASON: To allocate funds to the appropriate account number in the ParaCruz Department.

5-7.a9

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

DATE: January 28, 2005

TO: Board of Directors

FROM: Steve Paulson, Paratransit Administrator

SUBJECT: METRO PARACRUZ PROGRAM STATUS MONTHLY UPDATE

I. RECOMMENDED ACTION

This report is for information only- no action requested

II. SUMMARY OF ISSUES

- The Board receives monthly reports on the status of the federally mandated ADA complementary paratransit program
- Operating Statistics reported are for the month of October 2004
- These statistics are for the final month of ParaCruz service provided by Lift Line
- Cost reflects hourly rate increased by 4% effective July 2004.
- Eligibility/certification statistics reported are through December 31, 2004

III. DISCUSSION

Operating Statistics for October 2004

	This Oct	Last Oct	% Change	FYTD	Last FYTD	% Change
Cost	\$205,866.32	\$224,002.13	-8.10%	\$806,252.48	\$849,979.05	-5.14%
Revenue	\$22,485	\$25,701	-12.51%	\$87,678.00	\$94,464.00	-7.18%
Subsidy	\$183,381.32	\$198,301.13	-7.52%	\$718,574.48	\$755,515.05	-4.89%
Rides performed	7521	8709	-13.64%	28,802	32,155	-10.43%
Cost/ Ride	\$27.37	\$25.72	6.42%	\$27.99	\$26.43	5.90%
Productivity	2.02	2.05	-1.51%	2.00	1.99	.50%

* Revenue does not equal \$3.00/ride because no revenue is generated by rides to and from certification interviews or appeals.

5-8.1

Performance Measures
Calendar year figures

	July	Aug	Sept	Oct	FYTD
Rides performed	7,025	6,684	7,572	7,521	28,802
late pick ups (more than 20 minutes)	324	236	379	389	1,328
% late	4.61%	3.5%	5.0%	5.17%	4.61%
Picked up too early (more than 10 minutes)	86	73	110	76	345
Total rides not "on time"	410	309	489	465	1,673
% "on time"	94.2%	95.4%	93.5%	93.82%	94.19%
missed trips	0	0	1	2	3
Excessively late scheduled (more than 60 minutes)	2	4	9	14	29
Excessively late will call (more than 100 minutes)	5	3	4	12	24
total violation w/ \$50 penalty	7	7	14	28	56
Total violation w/\$100 penalty	0	0	0	0	0
Liquidated damages	\$350	\$350	\$700	\$1,400	\$2,800

Eligibility Certification/ Recertification

During the month of December 2004, there were 52 applicants for eligibility. 94.2% were found eligible for some level of service. The total number of eligible riders is effected by expiration of temporary eligibility and other factors. ParaCruz experienced a in a net increase of 17 riders eligible for service during December.

There are no eligibility appeals currently pending.

IV. FINANCIAL CONSIDERATIONS

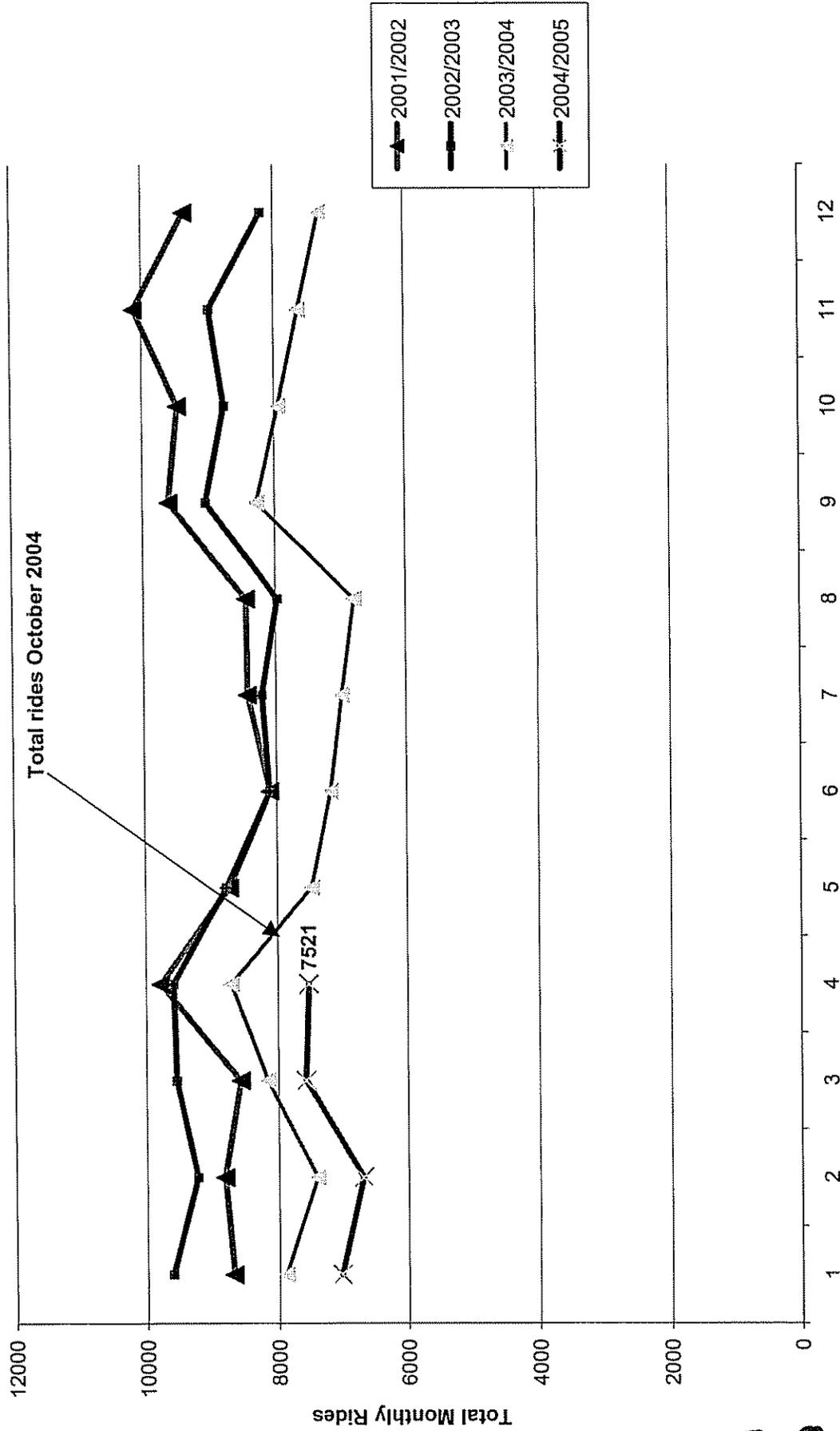
None at this time

V. ATTACHMENTS

- Attachment A:** METRO ParaCruz Rides by Month
- Attachment B:** METRO ParaCruz Cost by Month
- Attachment C:** Recertification and New Applicant Eligibility Determinations
- Attachment D:** METRO ParaCruz Registrants by Month

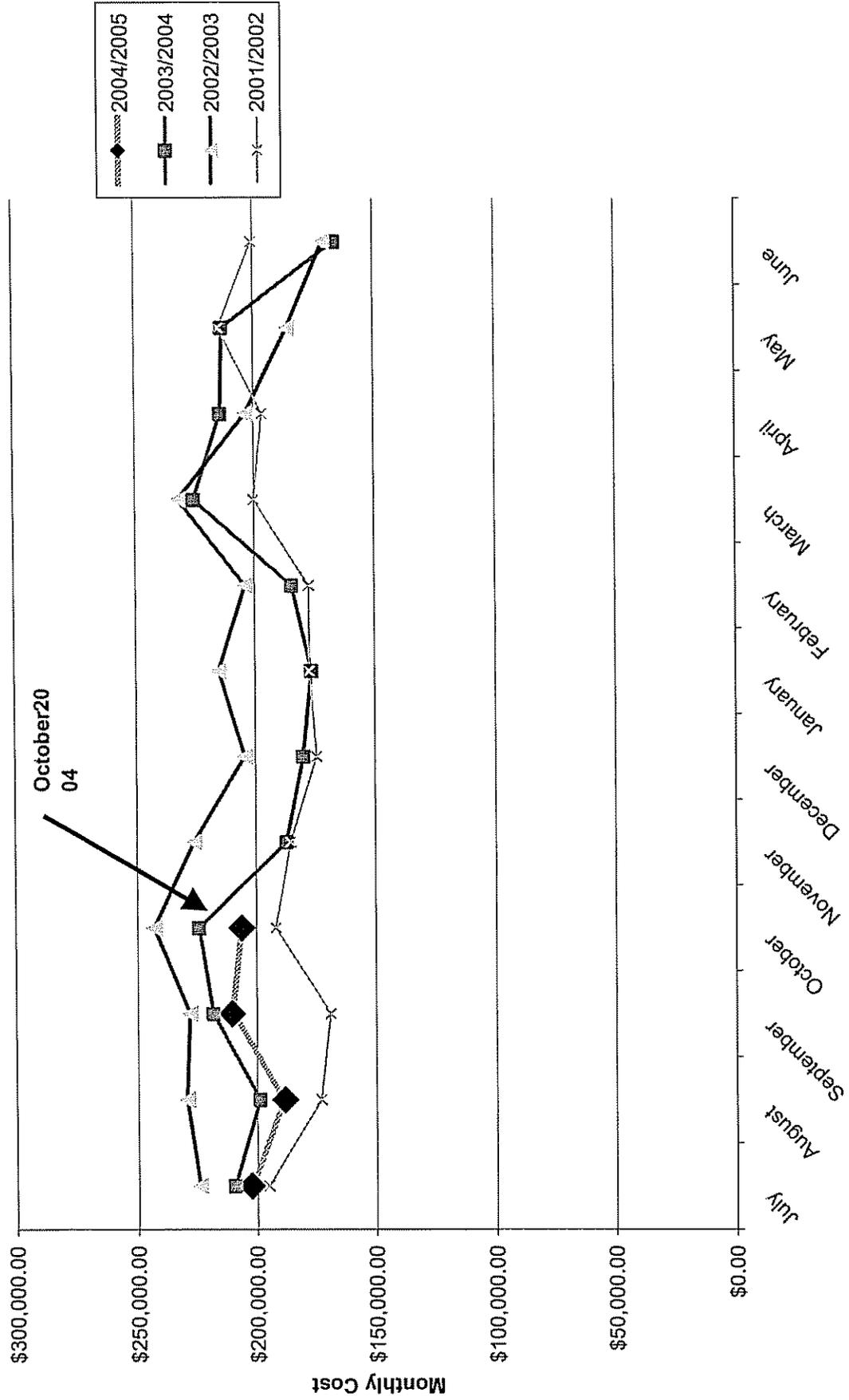
5-8.2

METRO ParaCruz Rides by Month



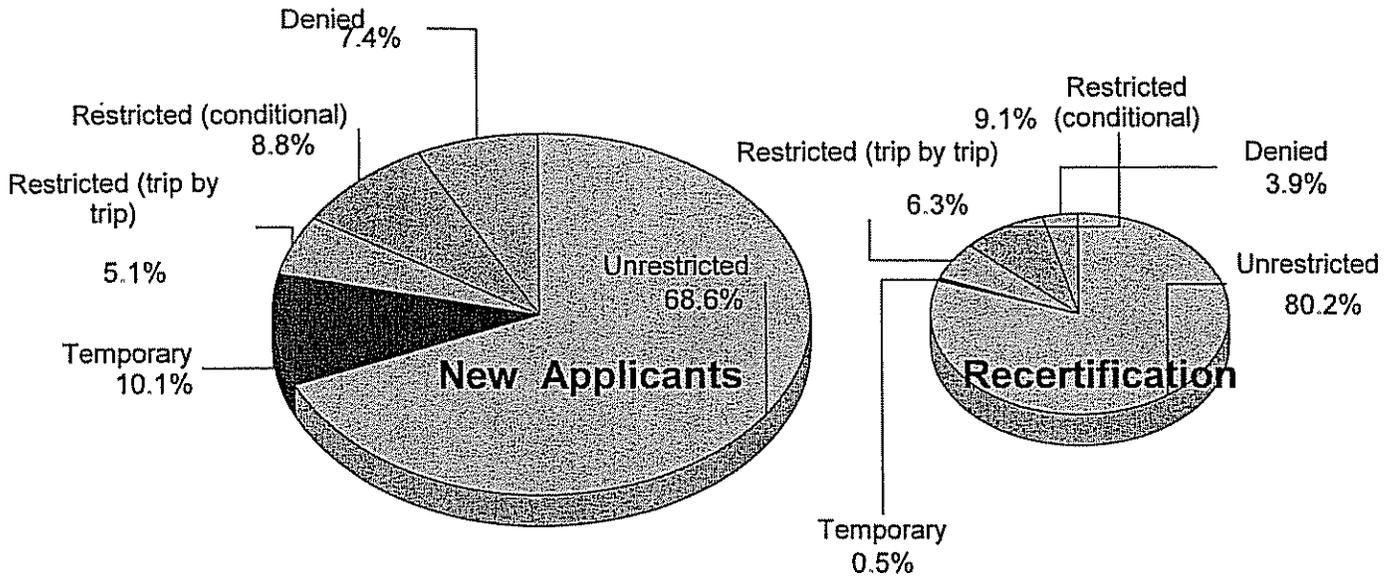
5-8.91

METRO ParaCruz Cost By Month



19.8-5

METRO ParaCruz Eligibility Determinations - Aug 1 02 through Dec 31 04



New Applicants

Unrestricted	1598
Temporary	235
Restricted (trip by trip)	119
Restricted (conditional)	206
Denied	172
Group Total:	2330

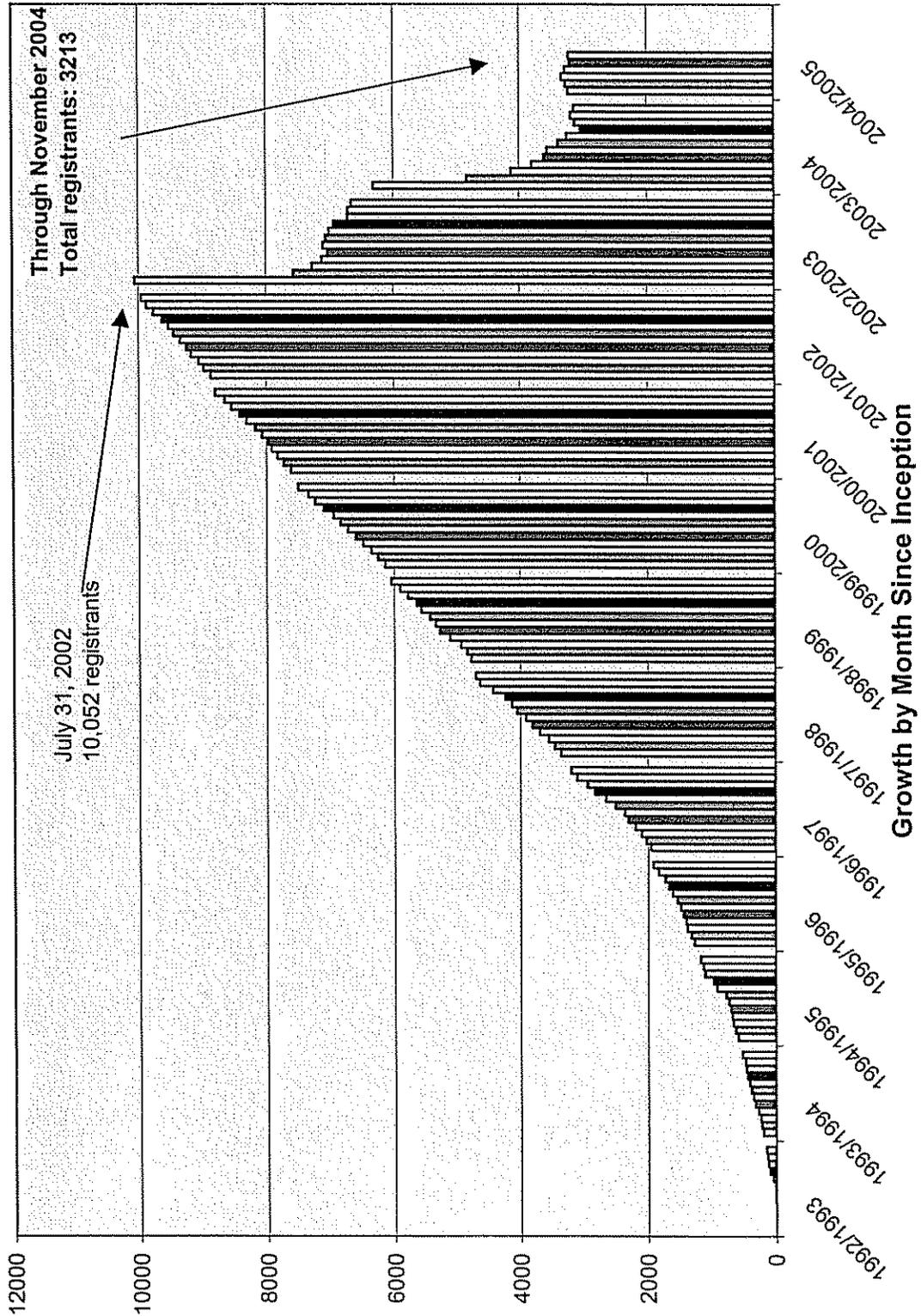
Recertification

Unrestricted	1036
Temporary	7
Restricted (trip by trip)	81
Restricted (conditional)	118
Denied	50
Group Total:	1292

Grand Total: **3621**

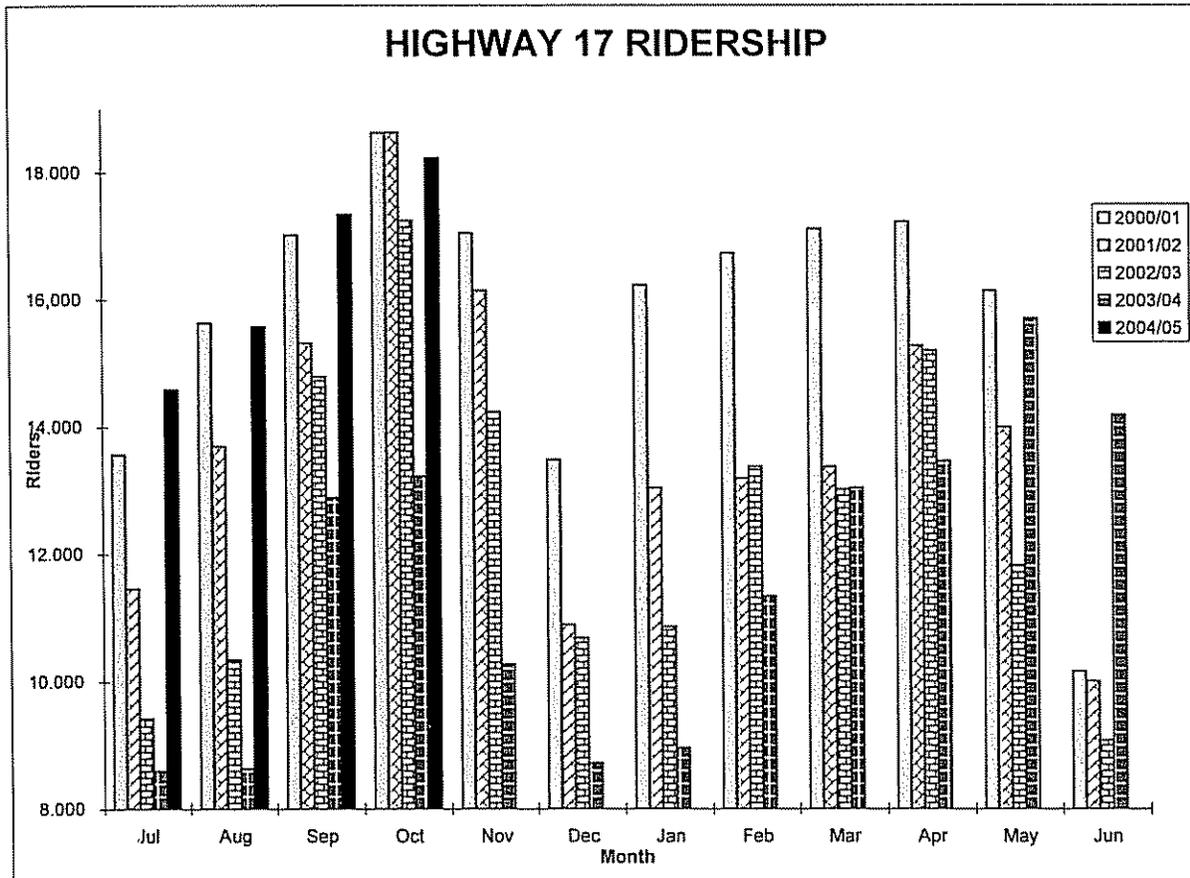
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METRO ParaCruz Registrants



HIGHWAY 17 - OCTOBER 2004

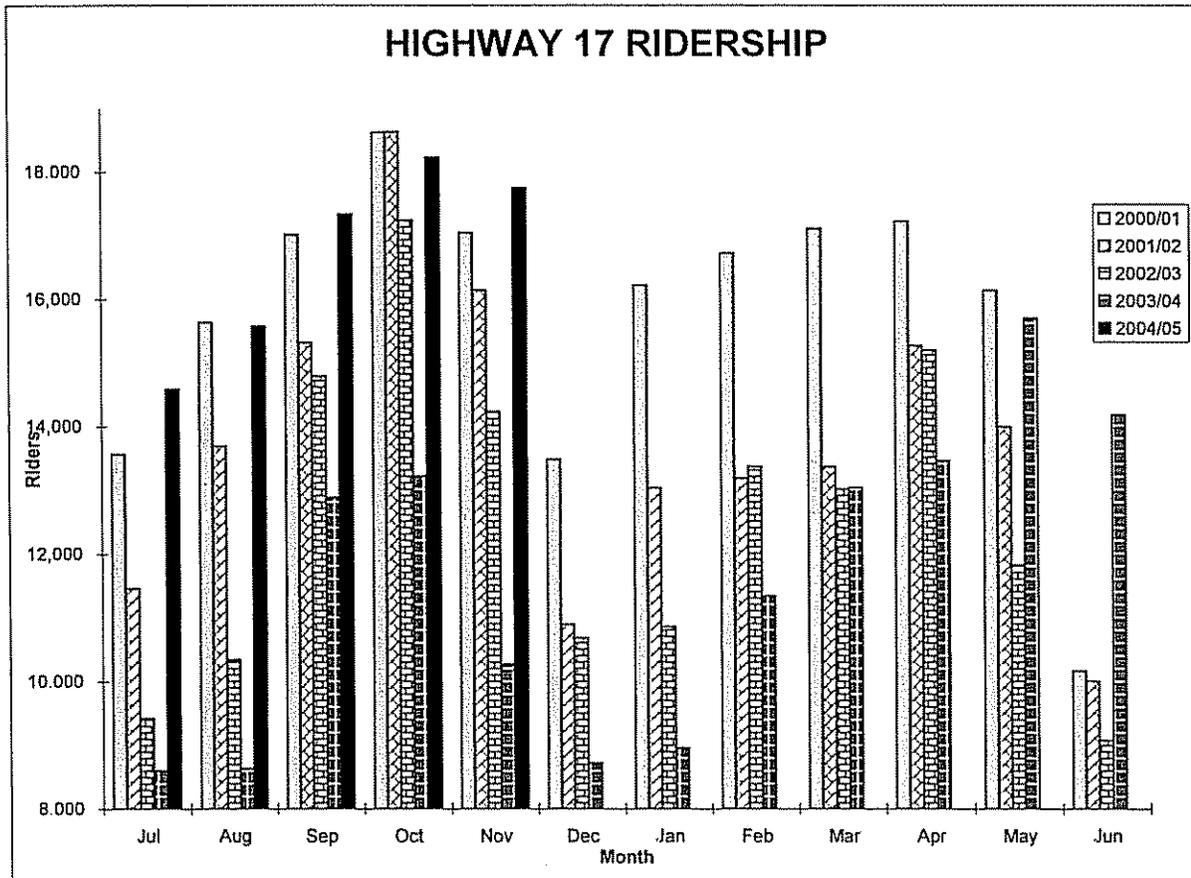
	October			YTD		
	This Year	Last Year	%	This Year	Last Year	%
FINANCIAL						
Cost	\$ 114,376	\$ 89,224	28.2%	\$ 459,442	\$ 337,500	36.1%
Farebox	\$ 58,725	\$ 32,021	83.4%	\$ 203,541	\$ 108,596	87.4%
Operating Deficit	\$ 48,152	\$ 54,604	(11.8%)	\$ 217,124	\$ 224,278	(3.2%)
Santa Clara Subsidy	\$ 24,076	\$ 27,302	(11.8%)	\$ 108,562	\$ 112,139	(3.2%)
METRO Subsidy	\$ 24,076	\$ 27,302	(11.8%)	\$ 108,562	\$ 112,139	(3.2%)
San Jose State Subsidy	\$ 2,478	\$ 2,599	(4.6%)	\$ 5,759	\$ 4,626	24.5%
AMTRAK Subsidy	\$ 5,021	\$ -		\$ 33,019	\$ -	
STATISTICS						
Passengers	18,233	13,224	37.9%	65,743	43,361	51.6%
Revenue Miles	41,271	31,037	33.0%	165,551	117,495	40.9%
Revenue Hours	1,548	1,094	41.5%	6,208	4,141	49.9%
Passengers/Day	588	575	2.3%	534	498	7.2%
Passengers/Weekday	741	-		667	-	
Passengers/Weekend	268	-		238	-	
PRODUCTIVITY						
Cost/Passenger	\$ 6.27	\$ 6.75	(7.0%)	\$ 6.99	\$ 7.78	(10.2%)
Revenue/Passenger	\$ 3.22	\$ 2.42	33.0%	\$ 3.10	\$ 2.50	23.6%
Subsidy/Passenger	\$ 2.78	\$ 4.33	(35.8%)	\$ 3.39	\$ 5.28	(35.8%)
Passengers/Mile	0.44	0.42	5.7%	0.40	0.37	7.6%
Passengers/Hour	11.78	10.26	14.8%	10.59	10.47	1.1%
Recovery Ratio	51.3%	35.9%	43.1%	44.3%	32.2%	37.7%



5-9.1

HIGHWAY 17 - NOVEMBER 2004

	November			YTD		
	This Year	Last Year	%	This Year	Last Year	%
FINANCIAL						
Cost	\$ 115,057	\$ 69,828	64.8%	\$ 574,499	\$ 407,327	41.0%
Farebox	\$ 59,229	\$ 28,703	106.4%	\$ 262,769	\$ 137,299	91.4%
Operating Deficit	\$ 47,856	\$ 39,229	22.0%	\$ 264,980	\$ 263,507	0.6%
Santa Clara Subsidy	\$ 23,928	\$ 19,615	22.0%	\$ 132,490	\$ 131,754	0.6%
METRO Subsidy	\$ 23,928	\$ 19,615	22.0%	\$ 132,490	\$ 131,754	0.6%
San Jose State Subsidy	\$ 2,642	\$ 1,895	39.4%	\$ 8,401	\$ 6,521	28.8%
AMTRAK Subsidy	\$ 5,330	\$ -		\$ 38,349	\$ -	
STATISTICS						
Passengers	17,753	10,275	72.8%	83,496	53,636	55.7%
Revenue Miles	40,666	24,347	67.0%	206,217	141,841	45.4%
Revenue Hours	1,525	858	77.7%	7,733	4,999	54.7%
Passengers/Day	592	571	3.7%	546	511	6.8%
Passengers/Weekday	735	-		681	-	
Passengers/Weekend	257	-		241	-	
PRODUCTIVITY						
Cost/Passenger	\$ 6.48	\$ 6.80	(4.6%)	\$ 6.88	\$ 7.59	(9.4%)
Revenue/Passenger	\$ 3.34	\$ 2.79	19.4%	\$ 3.15	\$ 2.56	22.9%
Subsidy/Passenger	\$ 2.84	\$ 4.00	(28.9%)	\$ 3.27	\$ 5.03	(35.0%)
Passengers/Mile	0.44	0.41	5.2%	0.40	0.38	7.1%
Passengers/Hour	11.64	10.18	14.3%	10.80	10.73	0.6%
Recovery Ratio	51.5%	41.1%	25.2%	45.7%	33.7%	35.7%



5-9.2

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

DATE: January 21, 2004
TO: Board of Directors
FROM: Bryant J. Baehr, Manager of Operations
SUBJECT: UNIVERSITY OF CALIFORNIA - SANTA CRUZ SERVICE UPDATE

I. RECOMMENDED ACTION

This report is for information purposes only. No action is required

II. SUMMARY OF ISSUES

- Student trips for November 2004 increased by 8.5% versus November 2003. Year to date student billable trips have increased by 6.1%.
- Faculty / staff trips for November 2004 increased by 5.0% versus November 2003. Year to date faculty / staff billable trips have decreased by (3.8%).
- Revenue received from UCSC for November 2004 was \$200,013 versus \$175,793 for November 2003 an increase of 13.8%.

	Faculty/Staff Ridership	Student Ridership	Monthly Increase - (Decrease) Student	Monthly Increase - (Decrease) Faculty-Staff
This Year	16,850	208,138	8.5%	5.0%
Last Year	16,053	191,778		

***In November 2003 there were 17 days of instruction. In November 2004 there were 19 days of instruction.**

III. DISCUSSION

UCSC started Fall instruction on September 23, 2004. A summary of the results for November 2004 is:

- Student billable trips for the month of November 2004 were 208,138 vs. 191,778 for November 2003 an increase of 8.5%.
- Faculty / staff billable trips for the month of November 2004 were 16,850 vs. 16,053 for November 2003 an increase of 5.0%.
- Year to date Student billable trips increased by 6.1% and faculty / staff billable trips decreased by (3.8%).
- Revenue for November 2004 was \$200,013 versus \$175,793 for November 2003.

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IV. FINANCIAL CONSIDERATIONS

NONE

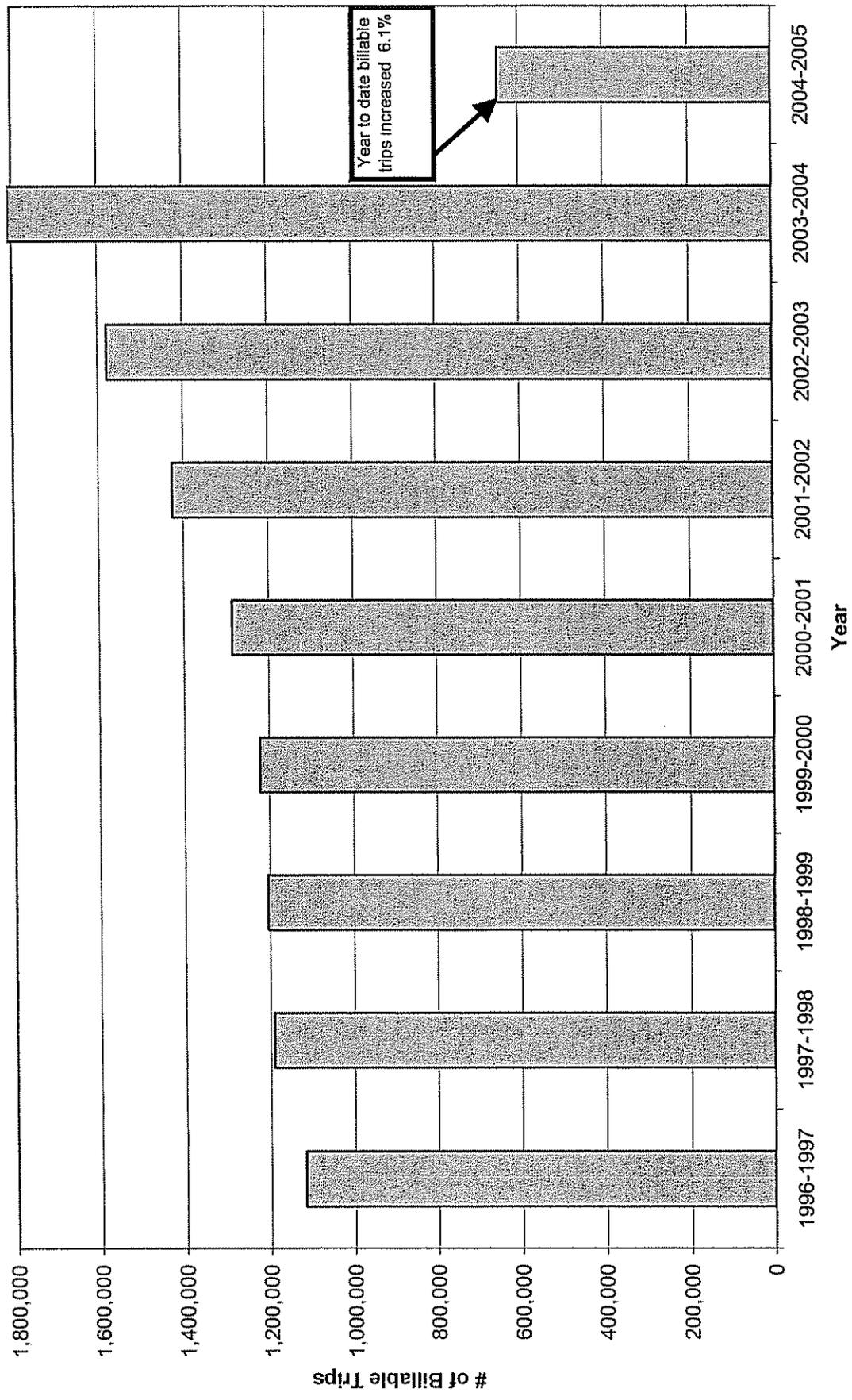
V. ATTACHMENTS

Attachment A: UCSC Student Billable Trips

Attachment B: UCSC Faculty / Staff Billable Trips

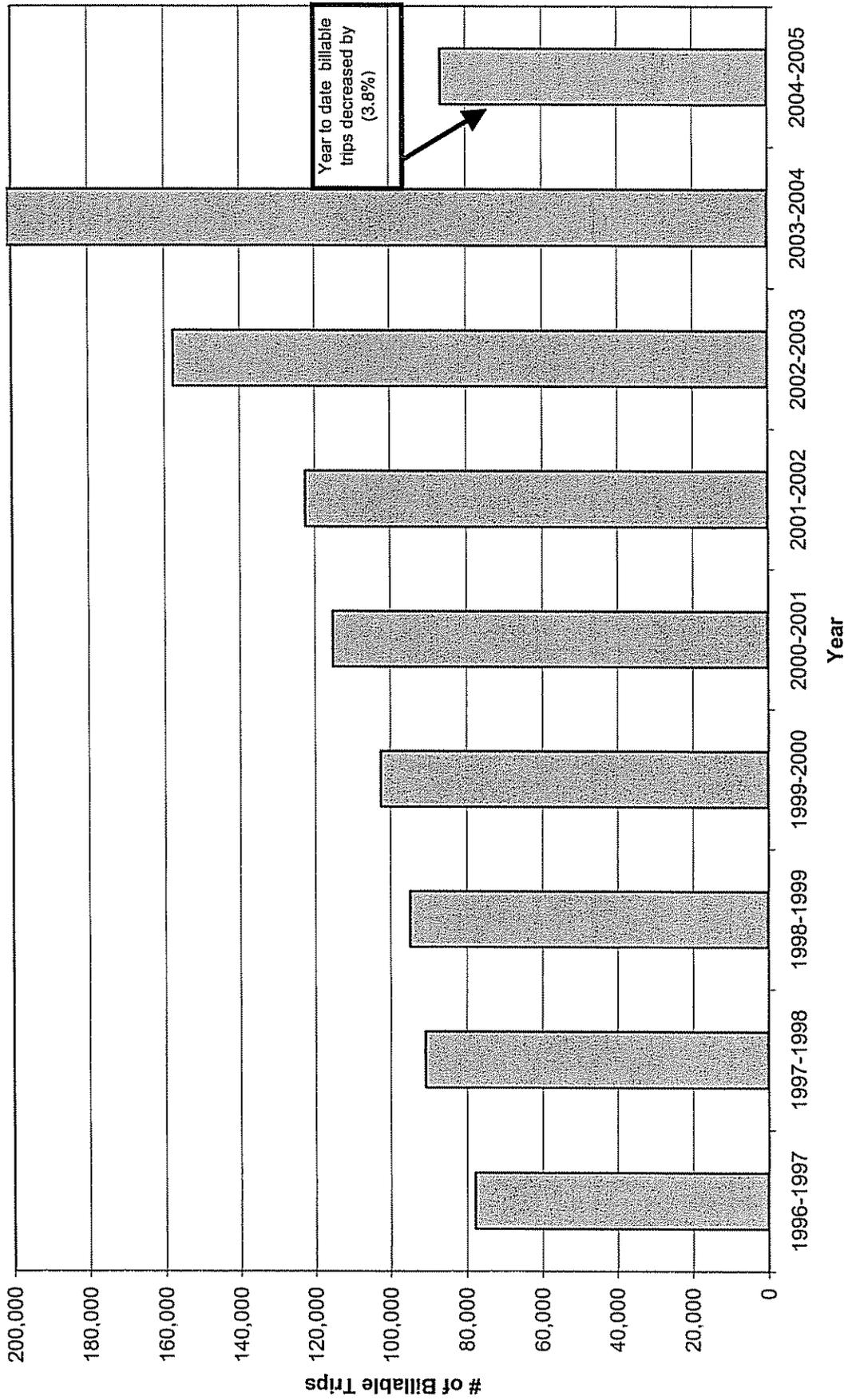
5-10.2

UCSC Student Billable Trips



5-10.91

UCSC Faculty / Staff Billable Trips



5-10.61

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

DATE: January 28, 2005
TO: Board of Directors
FROM: Mark J. Dorfman, Assistant General Manager
SUBJECT: ACCEPT AND FILE VOTING RESULTS FROM APPOINTEES TO THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION FOR PREVIOUS MEETINGS

I. RECOMMENDED ACTION

That the Board of Directors accept and file the voting results from appointees to the Santa Cruz County Regional Transportation Commission.

II. SUMMARY OF ISSUES

- Per the action taken by the Board of Directors, staff is providing the minutes from the most recent meetings of the Santa Cruz County Regional Transportation Commission.
- Each month staff will provide the minutes from the previous month's SCCRTC meetings.

III. DISCUSSION

At the January Board of Directors Meeting of the Santa Cruz Metropolitan Transit District, the Board requested that staff include in the Board Packet information relating to the voting results from the appointees to the Santa Cruz County Regional Transportation Commission. Staff is enclosing the minutes from these meetings as a mechanism of complying with this request.

IV. FINANCIAL CONSIDERATIONS

There is no cost impact from this action.

V. ATTACHMENTS

Attachment A: Minutes of the December 2, 2004 Regular SCCRTC Meeting

5-12.1

SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION
AND
SERVICE AUTHORITY FOR FREEWAY EMERGENCIES

MINUTES

Thursday,
December 2, 2004
9:00 a.m.

Board of Supervisors Chambers
701 Ocean Street
Santa Cruz CA 95060

1. Roll Call

Members Present: Cliff Barrett (Alt.) Ellen Pirie
 Jan Beautz Emily Reilly
 Tim Fitzmaurice (Alt.) Pat Spence
 Ramon Gomez Mark Stone
 Dennis Norton Mardi Wormhoudt
 Edenilson Quintanilla (Alt.)
 Marcela Tavantzis Alt.)
 Gregg Albright (ex-officio)

Staff Present: Linda Wilshusen Pat Dellin
 Kim Shultz Tegan Speiser
 Gini Pineda Luis Mendez
 Karena Pushnik Cory Caletti
 Grace Blakeslee Rachel Moriconi

2. Oral Communications

Spike Alper said that the Regional Transportation Commission should terminate the Environmental Impact Report for the Highway 1 Widening HOV Lane Project now since Measure J was defeated. He added that the money should be used for other transportation projects.

Mike Dalbey took issue with statements that the demise of Measure J was the fault of the voters, specifically citing comments from the previous Commission meeting that the voters are selfish and unwilling to compromise for the good of the county and that they don't want to pay for what they want. He stated that voters did approve a tax measure for the transit district and that the number of people who voted for it far exceeds the number of riders, and that people voted for Proposition 116 and have been paying for it for 14 years, even though it has not been used. He said the deficiencies lay with Measure J and not with the voters' attitudes.

5-12.91

Mark Greenfield praised the new train from Los Angeles to San Luis Obispo and said he hopes it will have a stop in Watsonville soon. He added that the park and ride lots in Santa Cruz connect to the "Baby Bullet" train from San Jose and asked the Commission to promote it.

3. Additions or Deletions to Consent and Regular Agendas

Replacement pages for Item 9, additional comments from the public, the Director's Report and a handout regarding Item 32 were distributed.

CONSENT AGENDA (Pirie/Quintanilla)

Commissioner Wormhoudt and Commission Alternate Fitzmaurice registered "no" votes on Item 8 saying that to extend the contract with Apex Strategies was premature since there is no plan for funding the Highway 1 Widening Project as Measure J was defeated and that doing so establishes a direction that does not appear to be supported by the voters.

Deputy Director Pat Dellin said that the per hour contract extension would allow the Commission to consult with Apex Strategies from time to time without having to prepare a budget amendment for each consultation.

Commissioner Pirie said she would approve Item 9, Rules and Regulations, with the understanding that certain editing errors were corrected.

Commissioner Wormhoudt and Commission Alternates Gomez and Fitzmaurice abstained from approving Items 4 and 5.

The Consent Agenda was approved as amended.

4. Approved Minutes of November 4, 2004 Regular SCCRTC Meeting
5. Approved Minutes of November 18, 2004 Transportation Policy Workshop Meeting

POLICY

No Consent Items

PROJECTS and PLANNING

6. Accepted Highway 1 Projects Status Report
7. Approved Staff Recommendations Regarding Amended Claim from

5-12.02

SCMTD for State Transit Assistance Funds (Resolution 21-05)

COMMISSION BUDGET and EXPENDITURES

8. Approved Staff Recommendations Regarding Amendment to Contract with Apex Strategies for Planning Support Services (Resolution 22-05)

ADMINISTRATION

9. Approved Budget and Administration/Personnel Committee and Staff Recommendations Regarding Amendment to the SCCRTC's Rules and Regulations (Resolution 23-05)

COMMITTEE MINUTES

10. Accepted Draft Minutes of the Bicycle Committee Meeting of November 8, 2004
11. Accepted Draft Minutes of the Paratransit Coordination Task Force Meeting of November 17, 2004
12. Accepted Draft Minutes of the Interagency Technical Advisory Committee Meeting of November 18, 2004

INFORMATION/OTHER

13. Accepted Monthly Meeting Schedule
14. Accepted SCCRTC Staff Comment Letters on Draft Environmental Documents and Plans Prepared by Other Agencies
 - a. Quarterly Report
15. Accepted Correspondence Log (distributed at the meeting)
16. Accepted Letters from SCCRTC Committees and Staff to Other Agencies on Policy Issues
 - a. Letter from Executive Director to Caltrans Regarding Support for Santa Cruz Metro Application for FY 2005 FTA Transit Professionals Development Funds
17. Accepted Miscellaneous Written Comments from the Public on SCCRTC Projects and Transportation Issues

5-12.43

18. Accepted Handouts from Staff and Commissioners at Previous Regional Transportation Commission Meeting
19. Accepted Information Items
 - a. Article from *Mercury News* Titled "Highway 17 Safety Push Pays Off"
 - b. Article from *Contra Costa Times* Titled "Torlakson Tapped for Top Policy Post"
 - c. Article from *Los Angeles Times* Titled "DMV Chief Backs Tax by Mile"
 - d. Highlights of the California Association of Councils of Government (CALCOG) Meeting

SERVING AS THE SERVICE AUTHORITY FOR FREEWAY EMERGENCIES

20. Approved Staff Recommendations Regarding Contract for Private Call Answering Services (Resolution 27-05)

REGULAR AGENDA

21. Commissioner Reports - Oral Reports - None
22. Director's Report

Executive Director Linda Wilshusen delivered her final Director's Report noting that a Public Hearing regarding the Highway 1 HOV Widening project was scheduled for January 20, 2004 at 7:00 pm in the Board of Supervisors Chambers.

She said that the Regional Transportation Commission was discussing the possibility of joining with the Transportation Agency for Monterey County in the Request for Proposals process to contract with a consultant to identify options for trail segments for the Santa Cruz portions of the Monterey Bay Sanctuary Scenic Trail.

Ms. Wilshusen thanked the Commission and her staff for their support during her 19 years with the Commission.

23. Caltrans Report

Gregg Albright, Caltrans District 5, announced that the new Caltrans director, Will Kempton, will emphasize partnerships, efficiencies and customer service as his primary goals. He said Mr. Kempton will focus on ridding the Department of multiple layers of bureaucracy and delegating more decision making to the local level.

Mr. Albright said that the beginning of construction for the

5-12.24

Highway 1/17 Merge Lanes Project will be moved back to November due to a cash flow problem.

Commissioner Reilly said that she had previously asked Caltrans to put the 1/17 Merge Lanes plans in the local libraries so the public could have access to them. Mr. Albright will direct the project manager to look into the request and report back to the Commission.

Debbie Bulger, Mission Pedestrians, said at the last meeting Caltrans was asked to report back on the status of pedestrian access along the underpasses that are part of the Merge Lanes Project.

Mr. Albright replied that there were no plans for sidewalks under Market Street because of the way the bridge sits on the abutments. He said that if sidewalks were installed an unsafe situation could occur as cars might be pushed too close to the abutments. He said that lighting is planned for under the bridges at Market Street and Emeline Avenue.

Commissioner Reilly said that improvements at the intersection of Morrissey Boulevard and Highway 1 were taking too long. Mr. Albright said Caltrans is working with the City of Santa Cruz to re-stripe the crossing but that installing a stop light would not be possible in the near term. She also said she has been in discussions with people who use recycled water for landscaping and asked who to contact at Caltrans to further discussions.

Commissioner Pirie asked that Caltrans report back on continuing the extra lane southbound from La Fonda to the Soquel Drive interchange as part of the Highway 1/17 project.

Deputy Director Dellin said that Caltrans and the City of Santa Cruz had met several times to discuss the Morrissey Boulevard and the Highway 1/17 Merge Lanes project. She said that Caltrans will give a full presentation, hopefully in February, with information on all the underpasses and the possibility of an auxiliary lane.

Ms. Dellin said that the City is working on short, medium and long term plans to improve safety conditions at the Morrissey Boulevard interchange and asked that Caltrans increase their efforts to support installing a stop sign as a medium term solution.

Cliff Walters, Big Trees Railroad, suggested that there are places in the County that have recycled water to sell.

5-12.25

24. Introduction of California Highway Patrol Captain, Christina Manriquez

Executive Director Wilshusen welcomed Captain Manriquez. Captain Manriquez gave a brief overview of her experience and background, including a three month training at the FBI headquarters at Quantico. Ms. Manriquez, a Watsonville native, said she is happy to be assigned to Santa Cruz County and that her goals include improving the quality of safety and service the CHP provides.

25. Certificate of Appreciation for Departing State Senator Bruce McPherson

Executive Director Linda Wilshusen announced that Senator McPherson was unable to attend the meeting but that his aide, Michael Warren, would accept the certificate on the Senator's behalf.

Chair Beautz expressed her appreciation for Senator McPherson's broad spectrum of support.

Michael Warren said that both he and Senator McPherson had enjoyed working with the Commission and related a story describing some of the legislation that Senator McPherson was instrumental in crafting to assist transportation for disabled persons. He noted that the initial impetus for the legislation was a single phone call, emphasizing that each person can make a difference in society.

26. Update on Federal Legislative Actions - Oral Report by Congressman Sam Farr

Congressman Farr reported that legislation left unresolved in this last session, including the federal transportation bill, would be considered "dead" and would have to be re-introduced in the next Congressional session.

He predicted that federal funding would be flat due to the budget deficit and the "cut, squeeze and trim mentality" in Congress. He said the Commission was smart putting transportation, housing and child care together in the Depot Project so that many problems were solved within a single proposal, and that this approach helped to obtain approval for the \$1.5 million funding for the project.

Congressman Farr said that in Washington, "all politics are local" meaning that communities can change national policies, noting that California was the first state to introduce legislation for scenic highways and that now this is a national trend. He complimented the Regional Transportation Commission for its role in setting national

5-12.96

policy with its request to revise the federal funding formula so that smaller, high-density cities that actively support public transit get special consideration for transportation funding. This suggestion got more support from fellow Congress members than any other constituent-led legislation.

Congressman Farr encouraged the Commission to buy the rail line and advised Commissioners, when communicating with other agencies, to think about surrounding areas as a region and develop a comprehensive approach to transportation solutions.

He said that the Monterey Bay Scenic Sanctuary trail will be a huge asset for attracting tourists and that the area's greatest resources are its history and the diversity of its natural beauty. He concluded saying that as long as these resources are protected from commercialism and urban sprawl, the Santa Cruz/Monterey area will continue to draw visitors from all over the world bringing prosperity to the region.

27. Update on State Legislative Actions - Oral Report by State Assemblymember John Laird

Assemblymember Laird reviewed the continuing state budget crisis. He explained some of the Governor's plans to provide funding for transportation projects, including a bond against future revenues to be gained from an Indian gaming pact that Governor Schwarzenegger had negotiated. Assemblymember Laird said, however, that the bond could not be issued until the lawsuit filed against it had been settled.

Assemblymember Laird said that Proposition 42 would have been made whole by the Governor's gaming compacts but that there is a move in the Legislature to suspend the ability to protect the Proposition 42 revenues. He said that because most of the state budget funds are dedicated funds, protecting Proposition 42 revenues from use in the General Budget would mean severe cuts in health and social services, in addition to those already made.

Assemblymember Laird said there is still a gap of \$6-7 billion between revenues and expenses this year and it will probably increase next year unless some very hard choices are made.

28. Resolution of Appreciation for Linda Wilshusen, Executive Director

Commissioner Beautz, as her last act as Commission Chair, wished retiring Executive Director Linda Wilshusen happiness

5-12.27

and good luck and highlighted some of her achievements listed in a resolution (Resolution 24-05) presented by the Commission.

Commissioner Wormhoudt praised Ms. Wilshusen saying she brought intelligence and passion to her job and gave her a proclamation from the Board of Supervisors.

Commissioner Fitzmaurice delivered a proclamation from the City of Santa Cruz that reflected Ms. Wilshusen's multiple impacts. He said what mattered most was the human connection she brought to her work.

Commission Alternate Gomez presented a proclamation signed by the mayor of Watsonville and said that the City of Watsonville had been lucky to have had her support.

Commission Alternate Barrett presented a proclamation signed by the mayor of Scotts Valley and said that Director Wilshusen had done an outstanding job.

Commissioner Norton noted that the City of Capitola had done a proclamation as well, and said that Director Wilshusen is a great mediator and thanked her support for all forms of transportation.

Commissioner Reilly delivered a proclamation from the SCMTD and said the quality of life in Santa Cruz County had improved dramatically during Ms. Wilshusen's tenure as Executive Director.

Virginia Johnson, Ecology Action and the Santa Cruz Transportation Management Agency, presented a joint resolution and remarked that Director Wilshusen understands collaboration.

Debbie Hale, Transportation Agency of Monterey County, presented a resolution commending Ms. Wilshusen for her contributions to the region and support of collaborative efforts.

Deputy Director Pat Dellin spoke on behalf of the SCCRTC staff saying that Linda will be missed and had been an inspiration. She said that the fact that so many staff had remained with the Commission for so long was a testament to the respect the staff had for her.

Micah Posner, People Power, said he appreciated her leadership and support for alternative transportation.

Executive Director Wilshusen said she was overwhelmed and that she had mementos for each Commissioner. She noted that

5-12.28

the projects she worked on were at direction of Commission and illustrated the leadership of the Commission.

Ms. Wilshusen again thanked everyone and distributed a variety of memorabilia collected over the years. The Commission took a break and made cake available in the adjoining conference room.

29. Election of 2005 SCCRTC Chair and Vice-Chair

Commissioner Beautz said that Commissioners Keogh, Johnson and Campos had worked as the Nominating Committee and recommended Commissioner Pirie as Chair and Commissioner Johnson as Vice-Chair.

Commission Alternate Quintanilla nominated Commissioner Pirie as Chair and Commissioner Johnson as Vice-Chair. Commission Alternate Barrett seconded.

Commissioner Norton noted that usually the Vice-Chair moves into the Chair position. He said that since Commissioner Johnson had held the Vice-Chair position for two years and was unable to move into the Chair position, he moved to nominate Commissioner Stone as Vice-Chair. Commission Alternate Fitzmaurice seconded.

Commissioners discussed the issue of succession from Vice-Chair to Chair. Commission Alternate Gomez asked it would be better to have a Supervisor and city representative in those positions, rather than two Supervisors.

A vote was taken on the amendment which did not pass.

The main motion passed unanimously.

Commissioner Beautz immediately turned her position as Chair over to Commissioner Pirie.

30. Recreational Rail Draft Environmental Impact Report (DEIR) and Proposed Revised DEIR

Senior Planner Karena Pushnik reviewed the background of the Draft Environmental Impact Report (DEIR) for Recreational Rail between Capitola and Aptos with an extension to Seascape, noting that the comments received from the public were massive and detailed. She said that because of the extent of public comment and the possibility of litigation, the Commission had extended the contract with Public Affairs Management to reply to the large volume of comments and had contracted with Remy, Thomas, Moose and Manley for legal advice. She said that the draft *Business Plan* had been released to the public in September, 2004, after the close

5-12.29

of the Recreational Rail DEIR comment period.

Ms. Pushnik said that additional air quality risk assessments and noise studies had been conducted. She said that staff, and the environmental and legal consultants concluded that it would make sense to revise the DEIR to include an alternative with the reduced rail service as described in the draft *Business Plan*. She said the revised DEIR would address substantive environmental issues raised by comments in the original DEIR and that when the revised DEIR is released for comment it will give the public a more realistic project to consider.

Commissioners discussed that the additional funding necessary for the response to comments to the revised DEIR and its legal review would be allocated from Commission Reserves. Commissioner Beautz noted that replenishing these reserves would come from Transportation Development Act funds.

Commissioner Spence asked several questions including when the response from Union Pacific regarding the quiet zones was anticipated, how many crossings have automatic arms, and whether fares and hours of service would be included in the Environmental Impact Report. Ms. Pushnik replied that the Public Utilities Commission had been contacted regarding quiet zones and that the promising looked like a promising candidate. She said that four private road crossings do not have automatic crossing arms. Recreational Rail fares and hours of service were included in the *Business Plan* and would be addressed in the revised DEIR.

Ms. Spence asked how the service provider would be affected by a decrease in travel time or if there were fewer fares than projected. She asked for a staff report on that subject. These revenue and ridership projections are included in the draft *Business Plan*.

Commissioner Spence asked for clarification whether responses to the comments in the original DEIR would be included in the revised DEIR, noting that every comment had not received a response.

Executive Director Linda Wilshusen said that one benefit of the revised DEIR incorporating the *Business Plan* alternative will be to strengthen the DEIR so that comments from the original DEIR will either be addressed in the *Business Plan* or included in the responses.

Commissioner Spence asked if the Geomatrix Phase II Hazardous Materials Report had been included in the hazardous materials section of the DEIR. Mary Bean, PAM,

5-12.910

replied that Geomatrix could not prepare a report until Union Pacific granted a right of entry.

Commissioner Spence noted that Kirk Trost was planning to include additional information regarding hazardous materials and asked for a copy of this information.

Ms. Pushnik said that this information will be included in the revised DEIR.

Commissioner Spence also commented on the funding source for the additional expenses and asked for a spreadsheet breakdown on what funds were available and how they have been expended.

Commission Alternate Tavantzis asked what the advantage was to revise the DEIR when an updated business plan will be available in the future.

Director Wilshusen said that the Commission has expressed interest in completing the Environmental Impact Report prior to acquisition of the branch rail line. She suggested that the Commission may want to separate the EIR from the acquisition.

Commissioner Beautz said that the EIR should be completed before the acquisition.

Commissioner Wormhoudt supported the recommendation saying it makes sense to circulate a revised DEIR. She said the commitment to do an EIR was one of principle, not necessity, and agreed that future versions of the business plan won't change substantially.

Commissioner Norton asked if downsizing the planned service to three months would be approved by the California Transportation Commission if service would be reduced. Director Wilshusen said that the CTC is concerned with state law and does not specify how much recreational rail is needed to comply with Proposition 116 requirements. She said that a 48-day season would be equivalent to a four month season, but operating fewer days per week. She emphasized that this would be an alternative in the revised DEIR.

In response to an earlier question by Commissioner Beautz regarding the expenditure of the Proposition 116 funding so far, Ms. Wilshusen said that the money was spent on the business plan, the DEIR and appraisals. Regarding whether the RTC could use federal funds rather than Commission reserves for the DEIR, she noted that the use of federal funds would require the RTC to do a federal level

5-12.911

environmental review which is not necessary and would be very time consuming.

Robert Jones asked about the difference between an "alternative" Environmental Impact Report and a "revised" EIR.

Director Wilshusen said the prior DEIR would be augmented with an alternative project description in the responses to comments and changes to the noise assessment to form a Revised Environmental Impact Report.

Mr. Jones insisted that all questions raised by the public in the public comments to the original DEIR should be answered. In addition, he said the project is out of control and he would have done the business plan first and then the EIR. He requested that the 45 days for public review be extended to 60 days and said that the quiet zone concept was trading noise abatement for public safety.

Micah Posner said that disconnecting the EIR for recreational rail from the acquisition could be useful if the Commission was going to have to deal with frivolous lawsuits. Regarding quiet zones, Mr. Posner suggested neighborhood meetings to determine how residents felt.

David Wright, Friends of the Rail Trail, congratulated the Commission on completing negotiations but questioned whether reducing the number of days per year to achieve trip reduction may reduce profit margin and bring fewer people into businesses in Aptos.

Mark Greenfield said he agreed that reducing trips might not be a good idea. He said that his math showed a reduction from 1080 trips to 192 trips and suggested looking for something in the middle.

Marilyn O'Rourke said circulating a Revised DEIR will be confusing and that comments on the first DEIR should be answered. She said this was a good time to assess segmentation and re-think the EIR process.

She said if the Revised DEIR is done, the Commission should wait until the hazardous materials analysis had been completed and that it should include an independent assessment of trestles.

Ms. O'Rourke supported a 60-day review period and said she wanted the DEIR to address whether the track has less than a 10% useful life expectancy.

Joan Anderson, Seacliff, said there is lots of support in

5-12.912

Aptos and Seacliff for the train.

Sue Renner said the railroad is becoming more and more of a fiasco and that people support a bike path but not a train. She said the public was promised the response to comments and wants them now and that the project needs to be combined with the bike path.

Paul Elerick, Campaign for Sensible Transportation, congratulated the Commission on the purchase and said if a recreational rail line was necessary to acquire the branch line, so be it.

Ken Kannegaard, RMC, reminded the Commission that freight traffic should remain the priority.

Commissioner Wormhoudt asked staff to respond to several questions. She asked for an explanation how the Business Plan alternative relates to the main project in a Revised DEIR. Director Wilshusen said that it would be more cost effective to add in the business plan alternative than to do a separate DEIR for an independent alternative project.

Commissioner Wormhoudt asked why operating the train for fewer days was a good idea and requested that ridership information be included in the January Regional Transportation Commission report. She also asked if there would be a problem extending the public comment period to 60 days. Director Wilshusen said there would not be a problem.

Commissioners discussed why people who had already submitted comments to the original DEIR would be required to re-submit their comments.

Mary Bean, PAM, said that the California Environmental Quality Act (CEQA) required that comments to an EIR had to be submitted during the public comment period. She added that it might be possible to indicate that people had the option of resubmitting their original comments.

Kirk Trost, MOT, said that one thing to remember is that the consultants will be addressing the original comments when they draft the Revised DEIR. He said that staff could return in January with a plan to let the Commission know how comments submitted regarding the original DEIR would be addressed in the Revised DEIR.

Commissioner Wormhoudt moved to approve the staff, and the RTC's legal and environmental and legal advisor recommendations to:

5-12.913

1. Revise the DEIR to add a new alternative which conforms to the recreational rail service operating plan suggested in the draft *Business Plan*;
2. Return to the RTC in January with a proposed description of this new alternative, including the general level of service and station locations;
3. Return to the RTC in January with a proposed schedule for the Revised DEIR;
4. Draft and circulate the revised DEIR when completed [date TBD], for a 45-day review period; and
5. Approve a resolution authorizing the Executive Director to amend the RTC's contract with Public Affairs Management by adding \$30,000 to produce the revised DEIR, and to amend the RTC's contract with Miller, Owen & Trost by adding \$20,000 to allow for additional legal review by Jim Moose of the revised DEIR and response to comments, with funds to be allocated from Commission Reserve funds,

with the addition that staff return in January with a proposal for addressing comments that have been submitted so far and to increase the public comment period to 60 days.

Commissioner Norton seconded and the motion (Resolution 25-05) passed unanimously.

Commissioner Wormhoudt moved to continue Items 32 and 33 to the January meeting and to set a time limit to extend the current meeting to finish in 20 minutes. Commissioner Norton seconded and the motion carried unanimously.

31. Letter of Intent between Union Pacific Railroad Company and the SCCRTC Regarding Acquisition of the Santa Cruz Branch Line

Kirk Trost, Miller, Owen & Trost, reviewed the general parameters of the letter of intent saying that now the Commission could proceed with hazardous materials reports, bridge reports and other studies that required a right of entry. He added that this is not a final decision to purchase the rail line.

Commissioner Spence said the two biggest words that concerned her in the letter were "as is" and asked of the appraisers will have time to complete all the necessary studies before a decision has to be made. She requested that the Commission be given at least three weeks to read the reports.

Mr. Trost said that a more specific timeline should be ready in January.

Commissioners discussed whether appraisals will evaluate

5-12.214

structures, how old the Union Pacific reports are and if there are environmental problems would the Commission be responsible for remedying them.

Mr. Trost said there will be engineering analyses on the structures before the Commission is asked to make a decision and that Union Pacific is taking the view that the Commission will have the opportunity to really look at the condition of the line, and if significant problems are found, then either the terms would be renegotiated or the purchase not made.

Commissioner Pirie voiced concerns about maintenance costs, capital costs, and insurance costs and asked if Union Pacific was going to share whatever information the Commission might need, including lease information and rate information on current operations.

Mr. Trost said that the starting point is the business plan and that the Phase II environmental study, structural analyses, and other information will be blended into the plan. He said that Union Pacific probably won't disclose proprietary business information but will disclose standard information such as any spill, report, internal memo or anything that would affect the value of the property.

Commission Alternate Gomez left.

Robert Jones said the Letter of Intent made no concessions to the Commission and that it is bad policy to sign an agreement when the Commission only really has \$1.5 million of the \$12 million necessary for the purchase. He said the Commission thinks it is purchasing a strip of land but it is really a freight line and questioned whether public money be spent so a private operator can make money.

Dave Wright said that the Commission is well suited to run a railroad pointing out that public agencies run a great bus company and network of roads. He said the project can be funded because lots of people support using Proposition 116 funds which are public funds that the public should be allowed to spend.

Ken Kannegaard said that RMC staff is willing to work with the Commission and recognizes that sometime in the future that line will be purchased. He said that RMC does not expect there to be a change in the service they currently provide and wants to be involved in discussions regarding rates of a second hauler.

Debbie Bulger said to separate the issue of purchasing the rail line and how it will be used noting that the City of

S-12.915

Santa Cruz Master Transportation Plan recommends bus rapid transit on the rail line.

Piet Canin said he was thrilled that negotiations have gotten to this point and that having the corridor is a huge transportation advantage.

Commissioner Wormhoudt moved to extend the meeting to 1:30 pm and to conclude the public comment by 1:20 pm. Commissioner Norton seconded and the motion passed unanimously.

Mike Dalbey said it is difficult for the public to think about railroad operations as they are not part of most people's lives; that this issue touches on many issues like development and health; and that people have to get beyond biases. He said that education on railroad operation would help.

Cliff Walters said railroading is pretty straightforward and that it is important that the railroad, the shippers and all involved have some kind of communication.

Marilyn O'Rourke said that every study should be independently generated not be Union Pacific's studies and that liability issues should be independently investigated. She said the Commission had promised a demo train and that the Commission owed that to the public.

Micah Posner said he was glad the Commission was still going after the rail even after Measure J failed.

Commissioner Wormhoudt moved to authorize Chair Pirie to sign the Letter of Intent. Commissioner Norton seconded with a friendly amendment that staff look into bringing in a demo train.

The motion (Resolution 26-05) passed unanimously.

32. Update on State Transportation Funding Availability - Continued to the next meeting.
 - a. Staff Report
 - b. Memo on Proposition 42 Transportation Budget Summit
 - c. Report on Funding Appropriations Bill

33. 2004 Legislative Update and Draft 2005 Legislative Agenda - Continued to the next meeting.
 - a. Staff Report
 - b. Proposed 2005 State and Federal Legislative Agenda
 - c. Final 2004 State and Federal Legislative Agenda

5-12.216

- d. Rescue Transportation Proposal
- e. Report from Carolyn Chaney on Federal Legislation

CLOSED SESSION

34. Conference with Real Property Negotiator for Acquisition of the Santa Cruz Branch Rail Line Property: Santa Cruz Branch Rail Line from Watsonville Junction to Davenport

Agency Negotiator: Kirk Trost, Miller, Owen & Trost

Negotiation Parties: SCCRTC, Union Pacific

Under Negotiation: Price and Terms

OPEN SESSION

35. Next Meetings/Adjournment

The December Transportation Policy Workshop has been cancelled.

The next regular SCCRTC meeting is scheduled for Thursday, January 6, 2005 at 9:00 a.m. at the Santa Cruz City Council Chambers, 809 Center Street, Santa Cruz, CA 95060.

The next Transportation Policy Workshop is scheduled for Thursday, January 20, 2005 at 9:00 a.m. at the SCCRTC Offices, 1523 Pacific Avenue, Santa Cruz CA 95060.

A Public Hearing on Alternatives for the Highway 1 Project Approval/Environmental Document (PA/ED) is scheduled for Thursday, January 20, 2005 at 7:00 p.m. at the Board of Supervisors Chambers, 701 Ocean Street, Santa Cruz, CA 95060.

Respectfully submitted,

Gini Pineda, Staff

5-12.917

ATTENDEES

<u>Name</u>	<u>Representing</u>
Robert Yount	
Charles Sanchez	Caltrans
Debbie Bulger	Mission Pedestrians
Thomas Hiltner	SCMTD
Genevieve Bookwalter	Santa Cruz <i>Sentinel</i>
Mike Dalbey	FORT
Micah Posner	People Power
Paul Elerick	CFST
David Wright	FORT
John Presleigh	County Public Works
Daniel Senders	
Paul Greene	
Rachel Walker	
Debbie Hale	TAMC
Eric Child	
Robert Jones	
Gwen Essegian	
Marco Greenfield	
Spike Alper	
Shannon Bell	
Skylar Wilkins	
Tania Mortazari	
Leo Moll	
Sue Renner	
Donna Ziel	
Ken Kannegaard	RMC Pacific Materials
Jim Conklin	Business Council
Tamsin McEwen-Asker	People Power
William Grace	
Marilyn O'Rourke	
Virginia Johnson	Ecology Action/SCATMA
Charles Paulden	
Peter Scott	CFST
Joan Anderson	CFST
Cliff Walters	Big Trees Railroad
Bob Scott	SCCRTC Technical Advisor

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

NOTICE OF ACTION TAKEN IN CLOSED SESSION MEMORANDUM

DATE: January 14, 2005

TO: Board of Directors

FROM: Margaret Gallagher, District Counsel

SUBJECT: Notification Of Actions Taken In Closed Session Regarding The Following
Claims On The Dates Indicated:

Settlement with Guillermo Chavez

Settlement with Guillermo Chavez

On July 23, 2004, in closed session the Board of Directors authorized a final settlement with a Compromise and Release. The following directors authorized the settlement: Keogh, Norton, Reilly, Rotkin, Spence, Stone and Tavantzis. Directors Ainsworth, Beautz, Hinkle and Skillicorn were absent. Pursuant to this direction, Mr. Chavez' claim was settled by way of a Compromise and Release in the sum of \$7,500.00 signed by the Workers' Compensation Administrative Law Judge on December 15, 2004 and the file has been closed.

5-13.1

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

STAFF REPORT

DATE: January 14, 2005
TO: Board of Directors
FROM: Margaret Gallagher, District Counsel
SUBJECT: REVIEW AND ACCEPT SANTA CRUZ METRO BYLAWS AS MODIFIED REGARDING SECTIONS 6.01 (ELECTION OF PRESIDING OFFICERS) AND 14.02 (APPOINTMENT OF SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION REPRESENTATIVES)

I. RECOMMENDED ACTION

Review and Accept the Attachment with modified language for sections 6.01 and 14.02 of Santa Cruz METRO Bylaws to confirm the language accurately reflects the will of the Santa Cruz Metropolitan Transit District's Board of Directors.

II. SUMMARY OF ISSUES

- There is a need to confirm that the proposed attached language to sections 6.01 and 14.02 of the Santa Cruz METRO Bylaws, accurately reflects the will of the Santa Cruz Metropolitan Transit District's Board of Directors.

III. DISCUSSION

At the first regular meeting of the Santa Cruz METRO Board of Directors, the Board reviewed the procedure set forth in the Bylaws for the election of Board officers and the appointment of representatives to the Santa Cruz County Regional Transportation Commission (SCCRTC). At that time, some Directors wanted to consider amending the procedure. The matter was agendaized for the second meeting in December 2004 in order to allow the Board to modify its Bylaws should the Board deem that appropriate.

At the second meeting in December, the Board modified sections 6.01 and 14.02 of the Bylaws, as specifically set forth in Attachment A. The purpose of this staff report is to ensure that the modified language accurately reflects the will of the Board of Directors.

IV. FINANCIAL CONSIDERATIONS

None

V. ATTACHMENTS

Attachment A: Santa Cruz METRO's Bylaws Sections 6.01 and 14.02 showing modifications

ATTACHMENT A
AMENDED

PREVIOUS LANGUAGE

RECENTLY ENACTED LANGUAGE

VI. PRESIDING OFFICERS	VI. PRESIDING OFFICERS
<p>6.01 <u>Election</u></p>	<p>6.01 <u>Election</u></p>
<p>(a) The Directors shall in December nominate members of the Board of Directors to serve as Chair and as Vice-Chair of the Board of Directors. The Board of Directors shall, at their first regular meeting in January of each year, choose one of its members to serve as Chair and one of its members to serve as Vice-Chair to serve for the balance of the calendar year or until the selection of their successors.</p>	<p>(a) The Directors shall <u>at the first meeting in January in December</u> nominate members of the Board of Directors to serve as Chair and as Vice-Chair, of the Board of Directors. <u>Nominations may be received until final selections occur.</u> The Board of Directors shall, at their <u>its first second</u> regular meeting in January <u>(generally televised)</u> of each year, choose one of its members to serve as Chair and one of its members to serve as Vice-Chair to serve for the balance of the calendar year or until the selection of their successors. <u>The officer election shall be agendized at the second meeting immediately following the roll call and shall not be paired with any other item.</u></p>
<p>(b) Should the office of Chair or Vice-Chair become vacant during the calendar year, the Board of Directors shall choose a successor to fill the vacancy for the balance of that calendar year, or until the selection of a successor.</p>	<p>(b) Should the office of Chair or Vice-Chair become vacant during the calendar year, the Board of Directors shall choose a successor to fill the vacancy for the balance of that calendar year, or until the section of a successor <u>Should the office of Chair become vacant during the calendar year, the Vice-Chair shall assume the office of Chair. Should the office of Vice-Chair become vacant the nomination and selection of Vice-Chair shall be agendized and acted upon by the Board of Directors.</u></p>

<p>(c) In the event of a vacancy of both the Chair and Vice-Chair positions, the Directors shall meet in order to nominate members of the Board of Directors for the vacant positions</p>	<p>(c) In the event of a vacancy of both the Chair and Vice-Chair positions, the Directors shall meet in order to nominate members of the Board of Directors for the vacant positions <u>and make final selections.</u></p>
<p>14.02 <u>Appointment to Santa Cruz County Regional Transportation Commission</u></p> <p>(a) The Board of Directors shall each year in January appoint three representatives and three alternates (in order of priority) to the Santa Cruz County Regional Transportation Commission (SCCRTC) who must be members of the Board of Directors. The Board Chair shall submit nominations of three representatives and three alternates for the first Board meeting in January. At that first meeting in January, the Chair shall entertain other nominations for SCCRTC representatives and alternates from the Directors. Thereafter at the second meeting in January, the Board of Directors shall vote on the nominations via a motion and a second. To be appointed a nomination shall receive at least six affirmative votes. A Director may move a slate of three representatives or a slate of three alternates for appointment. If none of the previously nominated directors receive the appointments, then the Chair shall entertain further nominations from the Directors until such time as three representatives and three alternates are approved by the Board of Directors.</p>	<p>14.02 <u>Appointment to Santa Cruz County Regional Transportation Commission</u></p> <p>(a) The Board of Directors shall each year in January appoint three representatives and three alternates (in order of priority) to the Santa Cruz County Regional Transportation Commission (SCCRTC) who must be members of the Board of Directors. The Board Chair shall submit nominations of three representatives and three alternates for the first Board meeting in January. At that first meeting in January, the Chair shall entertain other nominations for SCCRTC representatives and alternates from the Directors. <u>Nominations may be received until final selections occur.</u> Thereafter, at the second meeting in January, the Board of Directors shall vote on the nominations via a motion and a second. To be appointed a nomination shall receive at least six affirmative votes. A Director may move a slate of three representatives or a slate of three alternates for appointment. If none of the previously nominated directors receive the appointments, then the Chair shall entertain further nominations from the Directors until such time as three representatives and three alternates are approved by the Board of Directors.</p>

<p>(b) The Board of Directors may provide its SCCRTC representatives with guidance on issues coming before the Commission to assist the director/commissioner in serving the best interests of the Transit District.</p>	<p>(b) The Board of Directors may provide its SCCRTC representatives with guidance on issues coming before the Commission to assist the director/commissioner in serving the best interests of the Transit District.</p>
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SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

DATE: January 28, 2005
TO: Board of Directors
FROM: Robyn Slater, Human Resources Manager
SUBJECT: PRESENTATION OF EMPLOYEE LONGEVITY AWARDS

I. RECOMMENDED ACTION

Staff recommends that the Board of Directors recognize the anniversaries of those District employees named on the attached list and that the Chairperson present them with awards.

II. SUMMARY OF ISSUES

- None.

III. DISCUSSION

Many employees have provided dedicated and valuable years to the Santa Cruz Metropolitan Transit District. In order to recognize these employees, anniversary awards are presented at five-year increments beginning with the tenth year. In an effort to accommodate those employees that are to be recognized, they will be invited to attend the Board meetings to receive their awards.

IV. FINANCIAL CONSIDERATIONS

None.

V. ATTACHMENTS

Attachment A: Employee Recognition List

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
EMPLOYEE RECOGNITION

TEN YEARS

None

FIFTEEN YEARS

None

TWENTY YEARS

Ronald C. Dean, Bus Operator
Jeffrey A. North, Bus Operator

TWENTY-FIVE YEARS

None

THIRTY YEARS

William D. De Vivo, Bus Operator
Mary C. Ferrick, Schedule Analyst

DRAFT

**Paratransit Coordination Task Force
MINUTES – MEETING # 7**

Wednesday, December 15, 2004, 2:15 – 5:00 pm
Louden Nelson Community Center, Senior Dining Room

Members Present:

Caroline Bliss-Isburg
Michael Bradshaw
Richard Camperud
Kathleen Johnson
Clay Kempf
Paul Marcelin-Sampson
Eileen Pavlik
Dennis Papadopulo
Carmen Robles
Stuart Rosenstein
Ernestina Saldana
Ellen Timberlake
Adam Tomaszewski
Arturo Zamudio

Staff Present:

Bryant Baehr, SCMTD
Pat Dellin, SCCRTC
Mark Dorfman, SCMTD
Karena Pushnik, SCCRTC
Tegan Speiser, SCCRTC
Link Spooner, Community Bridges

Others/Guests Present:

Sharon Barbour, MASTF
Michael Molesky, E&DTAC & CCAH

Alternates Present (* = voting):

Kirk Ance *
Michael Keogh*
James Monroe
Andy Schiffrin*

Andy Schiffrin called the meeting to order and thanked attendees for their flexibility about the meeting location change necessary due to another function at the Civic Center.

1. **Introductions** – Attendees introduced themselves
2. **Oral Communications** – Sharon Barbour announced that she was reelected as chair of the Metro Accessible Services Transit Forum (MASTF) and that the group will be taking a recess until November 2005. MASTF could meet in the interim should there be a need.
3. **Additions or Deletions to the Agenda** – Tegan Speiser requested that attendees provide their current email addresses on the sign-in sheet.

Consent Agenda

Item # 5 was pulled by Paul Marcelin-Sampson to be discussed as Item # 7.1 if time permits.

(Robles/Flynn) – The consent agenda was unanimously approved without item # 5.

4. **Approved the Minutes** of the November 17, 2004 Paratransit Coordination Task Force.

7.1

5. **This item will be discussed at a future meeting:** Example of Specialized Transportation Mobility Plan from Modoc County (see materials at this web site: (<http://www.itsmn.org/ruralits2004/presentations/Couch.pdf>))

Regular Agenda

6. ADA Paratransit Implementation Update

Bryant Baehr announced that things are going smoothly with ParaCruz. In the January/February 2005 time frame, staff will bring the Metro Board suggestions for operational parameters – such as on time performance, call waiting time, etc. – to be included in the monthly reports.

Katherine Johnson noted that she has been conducting discussions with people living in assisted living and skilled nursing facilities about their transportation needs. She will forward comments to the appropriate transportation service providers.

a. Same Day/Emergency Destination Changes in Service

Bryant discussed the direction from the November Task Force meeting to develop solutions for the issue of changing the ride destination. In the case of rides to/from the Dialysis Center, Bryant noted that they know of only one person who has needed to be transported to Dominican when their shunt closed and they couldn't proceed with dialysis. The situation was not a medical emergency. Link Spooner said that if the person was eligible for the Medical Voucher program, Lift Line could provide the ride.

Bryant also noted that it is infeasible to open up the ADA Paratransit program to provide same-day service, and that it seemed unnecessary to design a policy/procedure for just one person. Metro staff has talked internally about the issue with their legal staff. Discussion ensued about a situation such as the Task Force meeting where, due to a situation beyond the control of the rider, the location changed. At least one Task Force member was unable to attend the meeting due to this. Bryant asked for guidance from the Task Force on the matter.

Emily Reilly suggested that criteria be proposed for the Metro Board to consider that would be flexible to accommodate critical needs without opening up the program.

Jim Monroe volunteered that private taxi operators can provide on-demand rides for \$7.50 (from Dialysis to Dominican).

Additional comments on the subject included the following:

- Recommendation to perform a costs/equity analysis
- Caution against using trip purpose to define priority, as this is prohibited for ADA Paratransit rides
- Support for a customer service orientation and further analysis about how/whether these needs can be met
- Support for a perspective that is fiscally responsible, fair and satisfies legal requirements

- Frustration was expressed about the lack of solutions proposed by the Metro and the request for a new recommendation from the Task Force
- Recommendation to find out which service providers are able to offer solutions, what payment mechanisms are available to pay for the rides, who is willing to be cooperative and what would be the process
- Medi-Cal has flexibility and is committed to making sure customers medical trip needs are met
- Reference made to the 1992 Paratransit Implementation Plan policy to hold a public hearing if changes are made to Plan (ADA Paratransit Service)
- Same Day/Emergency Destination Change rides could be added to the Unmet Needs list

Actions:

- 1) Metro staff agreed to prepare a summary for the January Task Force meeting of what is being done for similar situations around the state, particularly for similar sized service operators. If possible, the matrix will include what local providers can offer; and,**
- 2) Copies of relevant pages from the 1992 Paratransit Implementation Plan will be provided with the January Task Force packet to consider revisions.**

Regarding the accommodation of large reclining wheelchairs on ParaCruz, Bryant Baehr noted that a person in a prone position (over 15 degrees) can not effectively be secured. For liability reasons, Metro has been advised not to carry these trips. Metro does have an oversize van that is available on a first come, first served basis for large wheelchairs including semi-reclining passengers (less than 15 degrees). As the minivans need to be replaced, Metro will consider vehicles that offer more flexibility. Other considerations include light weight wheelchairs that can not be secured without violating the warranty.

Kathleen Johnson asked whether people were being turned down if they did not have their identification card with them. Bryant answered that that is not the case.

Link Spooner reported that the ADA Paratransit calls to Community Bridges have diminished and that Lift Line operations are running smoothly.

7. Discuss Remainder of Task Force Goal 1: Funding Effectiveness and Efficiency, and Discuss Goal 2: Customer Service and Satisfaction

The Task Force continued the process of discussing and developing recommendations to address the second half of issues listed under Goal #1. The Draft List of Preliminary Recommendations formulated so far will be distributed with the January Task Force Agenda Packet. Specific issues discussed were:

- Entity/Role of the CTSA
- Co-mingling rides
- Coordination with land use (infrastructure, development, etc.)
- Encourage transit ridership
- Fair funding allocations

- Encourage multi-modal transportation
- Proximity of residences and urban services
- Process for determining unmet needs
- Duplication of services
- Specialized transportation needs outside the ADA criteria
- Service between counties

Generally there was consensus about both the short and long term recommendations. However, there were two issues on which the Task Force members were requested to vote. These are noted below in the actions recorded below.

Actions:

- ***RTC staff will research Consolidated Transportation Services Agency roles and duties around the state and provide a summary with the next packet.***
- ***The Task Force recommends that Metro look into free bus passes for ADA Paratransit conditionally eligible riders (Passed: 10 to 5 vote with hand count)***
- ***The Task Force recommends that Metro develop create an administrative mechanism that, in a financially prudent manner, allows a rider from out of the service area to stay on one vehicle. The trip might be billed to multiple funding sources. (Passed: 12 to 3 vote with hand count)***

8. Confirm next meeting and agenda topics:

The next meeting was confirmed for Wednesday, January 19, 2005 from 2:00 – 5:00p.m. at the ABC Room of the Civic Auditorium. Agenda topics will be to continue discussion and developing recommendations for Goal 2: Customer Service and Satisfaction. It is anticipated that a meeting will be held on February 17, 2005 to finalize recommendations.

9. Adjourn -- The meeting adjourned at 5:05 p.m.

Respectfully submitted by,

Karena Pushnik
Sr. Transportation Planner

\\\\Rtcserv1\\Internal\\E&DTAC\\Paratransit\\Task Force\\Meetings\\Dec04\\Minutes1204.doc

7.4

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

DATE: January 14, 2005
TO: Board of Directors
FROM: Tom Stickel, Manager of Fleet Maintenance
SUBJECT: CONSIDERATION OF CONTRACT RENEWAL FOR HAZARDOUS WASTE REMOVAL SERVICES WITH EVERGREEN OIL, INC.

ACTION REQUESTED

I. RECOMMENDED ACTION

District Staff recommends that the Board of Directors authorize the General Manager to enter into a one-year contract extension with Evergreen Oil, Inc. for hazardous waste removal services under the same terms and conditions.

II. SUMMARY OF ISSUES

- The District has a contract with Evergreen Oil, Inc. for hazardous waste disposal.
- At the District's option, this contract may be renewed for four (4) additional one-year terms.
- Evergreen Oil, Inc. has indicated that they are interested in extending the contract term through January 31, 2006 under the same terms and conditions.

III. DISCUSSION

The District currently has a contract with Evergreen Oil, Inc. for hazardous waste disposal. The contract is due to expire on January 31, 2005. Terms of the contract allow the District the option to renew the contract for four (4) additional one-year terms under the same terms and conditions. Evergreen Oil, Inc. has indicated that they are interested in extending the contract for one additional year under the same terms and conditions. District Staff recommends that the Board of Directors authorize the General Manager to enter into a one-year contract extension with Evergreen Oil, Inc. for hazardous waste removal services under the same terms and conditions.

IV. FINANCIAL CONSIDERATIONS

Funds are available in the Facilities Maintenance budget for this amendment.

V. ATTACHMENTS

Attachment A: Letter from Evergreen Oil, Inc.
Attachment B: Contract Amendment



Evergreen Oil, Inc.
6880 Smith Avenue
Newark, California 94560

29 November 2004

Mr. Lloyd Longnecker
District Buyer
Santa Cruz Metropolitan Transit District
120 Du Bois Street
Santa Cruz, California 95060

Re: Renewal of Contract No. 03-09

Dear Mr. Longnecker:

Evergreen Oil, Inc. (EOI) is in receipt of your letter dated 8 November 2004, requested we review the terms of the existing contract for renewal from the period of February 1, 2005 to 31 January, 2006. Upon review EOI is in agreement of extending the contract with no modifications. We look forward to providing hazardous waste removal services to the Santa Cruz Metropolitan Transit District for the upcoming year.

Should you require any additional information, please contact me at (510) 795-4400 x155.

Sincerely,
Evergreen Oil, Inc.


Gary B. Colbert
Vice President

10.a1

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
FIRST AMENDMENT TO CONTRACT NO. 03-09
FOR HAZARDOUS WASTE DISPOSAL SERVICES**

This First Amendment to Contract No. 03-09 for Hazardous Waste Disposal Services is made effective February 1, 2005 between the Santa Cruz Metropolitan Transit District, a political subdivision of the State of California ("District") and EVERGREEN OIL, INC. ("Contractor").

I. RECITALS

1.1 District and Contractor entered into a Contract for Hazardous Waste Disposal Services ("Contract") on February 1, 2004.

1.2 The Contract allows for the extension upon mutual written consent.

Therefore, District and Contractor amend the Contract as follows:

II. TERM

2.1 Article 3.02 is amended to include the following language:

This Contract shall continue through January 31, 2006. This Contract may be mutually extended by agreement of both parties.

III. REMAINING TERMS AND CONDITIONS

3.1 All other provisions of the Contract that are not affected by this amendment shall remain unchanged and in full force and effect.

IV. AUTHORITY

4.1 Each party has full power to enter into and perform this First Amendment to the Contract and the person signing this First Amendment on behalf of each has been properly authorized and empowered to enter into it. Each party further acknowledges that it has read this First Amendment to the Contract, understands it, and agrees to be bound by it.

SIGNATURES ON NEXT PAGE

10.61

Signed on _____

DISTRICT
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

Leslie R. White
General Manager

CONTRACTOR
EVERGREEN OIL, INC.

By _____
Gary B. Colbert
Vice President

Approved as to Form:

Margaret R. Gallagher
District Counsel

10.62

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

DATE: January 28, 2005
TO: Board of Directors
FROM: Tom Stickel, Manager of Fleet Maintenance
**SUBJECT: CONSIDER AMENDING BROWN ARMSTRONG PAULDEN MCCOWN
STARBUCK & KEETER ACCOUNTANCY CORPORATION
CONTRACT**

I. RECOMMENDED ACTION

District staff is recommending that the Board of Directors authorize the General Manager to execute an amendment to the contract with Brown Armstrong Paulden McCown Starbuck & Keeter Accountancy Corporation to extend the term of the contract for one (1) additional year.

II. SUMMARY OF ISSUES

- The District has a contract with Brown Armstrong Paulden McCown Starbuck & Keeter Accountancy Corporation for financial audit and tax services.
- At the option of the District, this contract may be renewed for two (2) additional one-year terms under the same terms and conditions.
- District staff recommends that the Board of Directors authorize the General Manager to execute an amendment to the contract with Brown Armstrong Paulden McCown Starbuck & Keeter Accountancy Corporation to extend the contract one (1) additional year.

III. DISCUSSION

The District's current contract with Brown Armstrong Paulden McCown Starbuck & Keeter Accountancy Corporation (Contractor) for financial audit and tax services is due to expire on February 28, 2005. Contractor has provided good service under this contract. An extension of the contract would be advantageous to the District. Section 4.01 of the contract allows the District the option to renew the contract under the same terms and conditions for two (2) additional one-year terms. On the Contractor's original proposal, pricing for the second and third option years was provided. Contractor had proposed the same rate for all three years. It is recommended that the Board of Directors authorize the General Manager to execute an amendment to the contract with Brown Armstrong Paulden McCown Starbuck & Keeter Accountancy Corporation to extend the contract one (1) additional year.

IV. FINANCIAL CONSIDERATIONS

Funds are available in the Finance budget for this amendment.

V. ATTACHMENTS

Attachment A: Contract Amendment

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
FIRST AMENDMENT TO PROFESSIONAL SERVICES CONTRACT FOR
FINANCIAL AUDIT AND TAX SERVICES (03-11)**

This First Amendment to Professional Services Contract for Financial Audit and Tax Services is made effective March 1, 2005 between the Santa Cruz Metropolitan Transit District, a political subdivision of the State of California ("District") and BROWN ARMSTRONG PAULDEN MCCOWN STARBUCK & KEETER ACCOUNTANCY CORPORATION ("Contractor").

I. RECITALS

- 1.1 District and Contractor entered into a Contract for Financial Audit and Tax Services ("Contract") on March 1, 2004.
- 1.2 The purpose of this First Amendment is to renew the one-year term and extend the agreement for a one-year period, pursuant to the provisions of paragraph 4 of the Contract, which allows for two additional one-year terms upon mutual written consent. This fully executed Amendment constitutes mutual written consent.

Therefore, District and Contractor amend the Contract as follows:

II. SPECIFICATION CHANGES

- 2.1 Paragraph 4.01 is amended to read as follows:

The term of this contract will be extended through February 28, 2006.

III. COMPENSATION

- 3.1 District agrees to compensate Contractor for Financial Audit and Tax Services at the rates quoted for the first option year as provided in Contractor's original proposal:

District Financial Audit Services, First Option Year: \$37,450.00

Preparation of Federal and State Tax Returns for Santa Cruz Civic Improvement Project,
First Option Year: \$250.00

IV. REMAINING TERMS AND CONDITIONS

- 4.1 All other provisions of the Contract that are not affected by this amendment shall remain unchanged and in full force and effect.

V. AUTHORITY

- 5.1 Each party has full power to enter into and perform this First Amendment to the Contract

11.a1

and the person signing this First Amendment on behalf of each has been properly authorized and empowered to enter into it. Each party further acknowledges that it has read this First Amendment to the Contract, understands it, and agrees to be bound by it.

Signed on _____

DISTRICT
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

Leslie R. White
General Manager

CONTRACTOR
BROWN ARMSTRONG PAULDEN MCCOWN STARBUCK & KEETER ACCOUNTANCY
CORPORATION

By _____
Steven R. Starbuck

Approved as to Form:

Margaret R. Gallagher
District Counsel

11.92

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

DATE: January 28, 2005

TO: Board of Directors

FROM: Tom Stickel, Manager of Fleet Maintenance

SUBJECT: REQUEST AUTHORIZATION TO USE THE STATE OF CALIFORNIA DEPARTMENT OF GENERAL SERVICES CONTRACT FOR THE PURCHASE OF TWO HYBRID SEDANS, ONE DEDICATED CNG PICKUP TRUCK AND ONE BI-FUEL PICKUP TRUCK

I. RECOMMENDED ACTION

District staff is recommending that the Board of Directors authorize the General Manager to use the State of California, Department of General Services contract for alternative fuel vehicles for the purchase of two each hybrid sedans, one each dedicated CNG pickup truck and one each bi-fuel pickup truck.

II. SUMMARY OF ISSUES

- The District has funding for the purchase of four replacement vehicles for use by Administrative Staff, Facilities Maintenance, and Fleet Maintenance.
- The State of California, Department of General Services has issued cooperative vehicle procurement contracts for the purchase of alternate fuel vehicles.
- The Federal Circular that governs procurement for federally funded purchases encourages joint purchasing when the procurement includes the applicable federally mandated clauses.
- The District requests the use State of California vehicle contracts for this procurement as a means of streamlining the procurement process.
- District staff recommends that the Board of Directors authorize the General Manager to use the State of California, Department of General Services contract for alternative fuel vehicles for the purchase of two each hybrid sedans, one each dedicated CNG pickup truck and one each bi-fuel pickup truck.

III. DISCUSSION

The District has funding for the purchase of two (2) each sedans and two (2) pickup trucks under the Capital Improvement Project District Funded budget to replace existing staff vehicles. These vehicle purchases will replace Staff vehicles #8014, #8015, #8016 and pickup #907. Each year the State of California prepares a bid for vehicles, trucks, vans and utility vehicles. The resulting cooperative purchasing contract allows smaller public agencies to purchase vehicles based on

statewide government agency requirements. This process allows for better pricing than the District would normally obtain due to the greater quantities requested in the state bid.

The FTA encourages grant recipients to utilize cooperative purchasing agreements whenever it is practical as a means of saving money. For this procurement, the District will add all of the required federal clauses to comply with FTA Circular 4220.1E, Third Party Contracting Requirements. The State of California charges a contract usage fee of 2.56 % based on the purchase order total before tax and any offered cash discounts.

It is recommended that the Board authorize the General Manager to use the State Procurement Process for the purchase of two each hybrid sedans, one each dedicated CNG pickup truck and one each bi-fuel pickup truck for a total amount not to exceed \$108,000.

IV. FINANCIAL CONSIDERATIONS

Funding for this contract is contained in the Capital Improvement Budget for Department 4100, Non-Revenue Vehicle Replacements, Budget Department 140002, and Budget Account 514070.

V. ATTACHMENTS

Attachment A: Vehicle Cost Summaries

State of California Vehicle Contract Pricing

	Unit Price	Extended
1. Two each Honda Hybrid Sedans	\$ 20,336.00	\$ 40,672.00
Sales Tax @ 8.25%	\$ 1,677.72	\$ 3,355.44
Optional 6 Years, 100,000 Miles Bumper to Bumper Extended Warranty	\$ 745.00	\$ 1,490.00
Delivery Charges	\$ 125.00	\$ 250.00
State Contract Usage Fee of 2.56%	\$ 520.60	\$ 1,041.20
Total Procurement Cost	\$ 23,404.32	\$ 46,808.64

	Unit Price	Extended
2. One each Regular Cab Dedicated CNG Pickup Truck	\$ 23,330.00	\$ 23,330.00
Sales Tax @ 8.25%	\$ 1,924.73	\$ 1,924.73
Optional 6 Years, 100,000 Miles Basic Guard Extended Warranty	\$ 1,155.00	\$ 1,155.00
Delivery Charges	\$ 125.00	\$ 125.00
State Contract Usage Fee of 2.56%	\$ 597.25	\$ 597.25
Total Procurement Cost	\$ 27,131.97	\$ 27,131.97

	Unit Price	Extended
3. One each Extended Cab Bi-Fuel Pickup Truck	\$ 25,865.00	\$ 25,865.00
Sales Tax @ 8.25%	\$ 2,133.86	\$ 2,133.86
Optional 6 Years, 100,000 Miles Bumper to Bumper Extended Warranty	\$ 1,155.00	\$ 1,155.00
Delivery Charges	\$ 125.00	\$ 125.00
State Contract Usage Fee of 2.56%	\$ 662.14	\$ 662.14
Total Procurement Cost	\$ 29,941.01	\$ 29,941.01

GRAND TOTAL FOR ALL VEHICLES \$ 103,881.62

12.21

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

DATE: January 28, 2005
TO: Board of Directors
FROM: Tom Stickel, Manager of Fleet Maintenance
SUBJECT: CONSIDERATION OF AWARD OF CONTRACT FOR FURNISHING LUBRICATION PRODUCTS

I. RECOMMENDED ACTION

District staff is recommending that the Board authorize the General Manager to enter into a two-year, firm fixed price contract with Western States Oil Company for the purchase of lubrication products.

II. SUMMARY OF ISSUES

- At the August 15, 1997 board meeting, the Board of Directors authorized the District's participation in the Regional Transit Coordinating Council (RTCC) cooperative purchase agreements.
- The RTCC Procurement Committee released an invitation for bid for lubrication products on August 17, 2004. The District is a participating transit agency in this bid.
- Bids were opened on September 28, 2004.
- RTCC Contract No. 2004-879RTCC was awarded to Western States Oil Company, Inc. for the purchase of lubrication products.
- District staff recommends that the Board authorize the General Manager to enter into a contract with Western States Oil Company, Inc. for the purchase of lubrication products in reference to the RTCC contract.

III. DISCUSSION

In order to obtain the best prices by combining annual quantities from several participating transit agencies, the RTCC Procurement Committee actively participates in joint procurements for commodities that are commonly used by RTCC member agencies.

RTCC bid documents were prepared and mailed in August to prospective bidders and legally advertised. On September 28, 2004 four bids were opened. Bids were evaluated with a recommendation that a contract be awarded to Western States Oil Company, Inc. as the lowest responsive bidder. District staff recommends that the Board authorize the General Manager to enter into a 2-year contract with Western States Oil Company, Inc. for the purchase of lubrication products in reference to the RTCC contract.

13.1

IV. FINANCIAL CONSIDERATIONS

Funding for the procurement of lubrication products is contained within the Fleet Maintenance operating budget. Annual estimated budget for lubrication products is \$10,000.

V. ATTACHMENTS

Attachment A: Contract with Western States Oil Company, Inc.

Note: The entire contract along with its exhibits are available for review at the Administration Office of METRO or online at www.scmtd.com

2004-879RTCC

CONTRACT FOR LUBRICATION PRODUCTS

THIS CONTRACT is made effective on March 29, 2004, between the SANTA CRUZ METROPOLITAN TRANSIT DISTRICT, a political subdivision of the State of California ("District"), and WESTERN STATES OIL COMPANY, INC., ("Contractor").

1. RECITALS

1.01 District's Primary Objective

District is a public entity whose primary objective is providing public transportation and has its principal office at 370 Encinal Street, Santa Cruz, California 95060.

1.02 District's Need for Lubrication Products

District requires the purchase of lubrication products to be used for standard purposes. In order to obtain said goods, the District entered into a covenant with the Regional Transit Coordinating Council (RTCC), on August 17, 2004, to obtain said goods for a period of two (2) years. This agreement, 2004-879RTCC, is attached hereto and incorporated herein by reference as Exhibit A.

1.03 Contractor's Bid Form

Contractor is a supplier of goods desired by the District and whose principal place of business is 1790 South 10th Street, San Jose, California. Contractor was chosen as the lowest responsive, responsible bidder by AC Transit District, in a fair and open bid. The results of said Bid are attached hereto and incorporated herein by reference as Exhibit B. A copy of Contractor's Bid Form is attached hereto and incorporated herein by reference as Exhibit C.

1.04 Selection of Contractor and Intent of Contract

On November 4, 2004, AC Transit District, the lead procuring agency for this Bid, selected Contractor as the lowest responsive, responsible bidder to provide said goods. The purpose of this Contract is to set forth the provisions of this procurement.

1.05 Contractor and Supplier Synonymous

For the purposes of this Contract, the terms "contractor" and "supplier" are synonymous.

District and Contractor agree as follows:

2. INCORPORATED DOCUMENTS AND APPLICABLE LAW

2.01 Documents Incorporated in This Contract

The documents below are attached to this Contract and by reference made a part hereof. This is an integrated Contract. This writing constitutes the final expression of the parties' Contract, and it is a complete and exclusive statement of the provisions of that Contract.

a) Exhibit A - RTCC's Governing Contract.

13. a1

b) Exhibit B - Bid Abstract

c) Exhibit C – Contractor’s Bid Form

d) Exhibit D- Invitation for Bid, Contract No. 2004-879RTCC

2.02 Conflicts

Where in conflict, the provisions of this writing supersede those of the above-referenced documents, Exhibits A, B, and C. Where in conflict, the provisions of Exhibit A supersede Exhibits B, C and D.

2.03 Recitals

The Recitals set forth in Article 1 are part of this Contract.

3. TIME OF PERFORMANCE

3.01 General

Contractor shall provide materials under this Contract at such times as deemed necessary by the District.

3.02 Term

The term of this Contract commences on the date of execution and shall remain in force through November 3, 2006.

4. COMPENSATION

4.01 Terms of Payment

Upon written acceptance, District agrees to pay Contractor as identified in the Bid Form, Exhibit C. Upon satisfactory delivery of materials under the terms and provisions of this Contract, District agrees to pay Vehicle Maintenance Program Inc. within thirty (30) days thereof. Contractor understands and agrees that if he/she exceeds the scheduled amounts payable under this contract, that it does so at its own risk.

4.02 Invoices

Contractor shall submit invoices referencing the District supplied Purchase Order number.

Invoice records shall be kept up-to-date at all times and shall be available for inspection by the District (or any grantor of the District, including, without limitation, any State or Federal agency providing project funding or reimbursement) at any time for any reason upon demand for not less than four (4) years after the date of expiration or termination of the contract. Under penalty of law, Contractor represents that all amounts billed to the District are (1) actually incurred; (2) reasonable in amount; (3) related to this contract; and (4) necessary for performance of the services. The District shall pay no expenses unless specifically allowed by this contract.

13. a2

5. NOTICES

All notices under this Contract shall be deemed duly given upon delivery, if delivered by hand; or three (3) days after posting, if sent by registered mail, receipt requested; to a party hereto at the address hereinafter set forth or to such other address as a party may designate by notice pursuant hereto.

DISTRICT

Santa Cruz Metropolitan Transit District
370 Encinal Street,
Santa Cruz, CA 95060

Attention: Lloyd Longnecker
District Buyer

CONTRACTOR

Western States Oil Company
1790 South 10th Street
San Jose CA 95112

Attention: E.L. Curry
General Manager

6. AUTHORITY

Each party has full power and authority to enter into and perform this Contract and the person signing this Contract on behalf of each has been properly authorized and empowered to enter into it. Each party further acknowledges that it has read this Contract, understands it, and agrees to be bound by it.

Signed on _____

DISTRICT—SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

Leslie White
General Manager

CONTRACTOR: BATTERIES USA, INC.

By _____
E.L. Curry
General Manager

Approved as to Form:

Margaret Rose Gallagher
District Counsel

13.a3

2004-879RTCC

CONTRACT FOR LUBRICATION PRODUCTS

THIS CONTRACT is made effective on March 29, 2004, between the SANTA CRUZ METROPOLITAN TRANSIT DISTRICT, a political subdivision of the State of California ("District"), and WESTERN STATES OIL COMPANY, INC., ("Contractor").

1. RECITALS

1.01 District's Primary Objective

District is a public entity whose primary objective is providing public transportation and has its principal office at 370 Encinal Street, Santa Cruz, California 95060.

1.02 District's Need for Lubrication Products

District requires the purchase of lubrication products to be used for standard purposes. In order to obtain said goods, the District entered into a covenant with the Regional Transit Coordinating Council (RTCC), on August 17, 2004, to obtain said goods for a period of two (2) years. This agreement, 2004-879RTCC, is attached hereto and incorporated herein by reference as Exhibit A.

1.03 Contractor's Bid Form

Contractor is a supplier of goods desired by the District and whose principal place of business is 1790 South 10th Street, San Jose, California. Contractor was chosen as the lowest responsive, responsible bidder by AC Transit District, in a fair and open bid. The results of said Bid are attached hereto and incorporated herein by reference as Exhibit B. A copy of Contractor's Bid Form is attached hereto and incorporated herein by reference as Exhibit C.

1.04 Selection of Contractor and Intent of Contract

On November 4, 2004, AC Transit District, the lead procuring agency for this Bid, selected Contractor as the lowest responsive, responsible bidder to provide said goods. The purpose of this Contract is to set forth the provisions of this procurement.

1.05 Contractor and Supplier Synonymous

For the purposes of this Contract, the terms "contractor" and "supplier" are synonymous.

District and Contractor agree as follows:

2. INCORPORATED DOCUMENTS AND APPLICABLE LAW

2.01 Documents Incorporated in This Contract

The documents below are attached to this Contract and by reference made a part hereof. This is an integrated Contract. This writing constitutes the final expression of the parties' Contract, and it is a complete and exclusive statement of the provisions of that Contract.

a) Exhibit A - RTCC's Governing Contract.

- b) Exhibit B - Bid Abstract
- c) Exhibit C – Contractor’s Bid Form
- d) Exhibit D- Invitation for Bid, Contract No. 2004-879RTCC

2.02 Conflicts

Where in conflict, the provisions of this writing supersede those of the above-referenced documents, Exhibits A, B, and C. Where in conflict, the provisions of Exhibit A supersede Exhibits B, C and D.

2.03 Recitals

The Recitals set forth in Article 1 are part of this Contract.

3. TIME OF PERFORMANCE

3.01 General

Contractor shall provide materials under this Contract at such times as deemed necessary by the District.

3.02 Term

The term of this Contract commences on the date of execution and shall remain in force through November 3, 2006.

4. COMPENSATION

4.01 Terms of Payment

Upon written acceptance, District agrees to pay Contractor as identified in the Bid Form, Exhibit C. Upon satisfactory delivery of materials under the terms and provisions of this Contract, District agrees to pay Vehicle Maintenance Program Inc. within thirty (30) days thereof. Contractor understands and agrees that if he/she exceeds the scheduled amounts payable under this contract, that it does so at its own risk.

4.02 Invoices

Contractor shall submit invoices referencing the District supplied Purchase Order number.

Invoice records shall be kept up-to-date at all times and shall be available for inspection by the District (or any grantor of the District, including, without limitation, any State or Federal agency providing project funding or reimbursement) at any time for any reason upon demand for not less than four (4) years after the date of expiration or termination of the contract. Under penalty of law, Contractor represents that all amounts billed to the District are (1) actually incurred; (2) reasonable in amount; (3) related to this contract; and (4) necessary for performance of the services. The District shall pay no expenses unless specifically allowed by this contract.

5. NOTICES

All notices under this Contract shall be deemed duly given upon delivery, if delivered by hand; or three (3) days after posting, if sent by registered mail, receipt requested; to a party hereto at the address hereinunder set forth or to such other address as a party may designate by notice pursuant hereto.

DISTRICT

Santa Cruz Metropolitan Transit District
370 Encinal Street,
Santa Cruz, CA 95060

Attention: Lloyd Longnecker
District Buyer

CONTRACTOR

Western States Oil Company
1790 South 10th Street
San Jose CA 95112

Attention: E.L. Curry
General Manager

6. AUTHORITY

Each party has full power and authority to enter into and perform this Contract and the person signing this Contract on behalf of each has been properly authorized and empowered to enter into it. Each party further acknowledges that it has read this Contract, understands it, and agrees to be bound by it.

Signed on _____

DISTRICT--SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

Leslie White
General Manager

CONTRACTOR: BATTERIES USA, INC.

By _____
E.L. Curry
General Manager

Approved as to Form:

Margaret Rose Gallagher
District Counsel

LUBRICATION PRODUCTS

For the term of November 4, 2004, through November 3, 2006

CONTRACT

THIS CONTRACT is made and entered into this 4th day of November 2004 by and between ALAMEDA CONTRA COSTA TRANSIT DISTRICT (hereinafter referred to as "District"), a special transit district established pursuant to California Public Utilities Code, Section 24501 et seq., and Western States Oil Company, 1790 S. 10th Street, San Jose, CA 95112 (hereinafter referred to as "Contractor")

THE PARTIES AGREE AS FOLLOWS:

1. SCOPE OF WORK

Contractor shall furnish to the District all labor, equipment, supplies, material and services as specified in and in full accordance with the Invitation for Bids issued by the District entitled:

LUBRICATION PRODUCTS NO. 2004-879RTCC

2. COMPONENT PARTS

This Contract shall consist of the following documents, each of which is on file with the District, and is incorporated into and made a part of the Contract by reference:

- A. This Contract
- B. Invitation for Bid No. 2004-879RTCC
- C. Contractor's submitted Bid Form

3. PERIOD OF PERFORMANCE

Contractor shall furnish lubrication products as specified in the Contract to commence November 4, 2004 and continue through November 3, 2006

4. CONTRACT PRICE

The District agrees to pay the Contractor in accordance with the fixed rates on the submitted bid form with a not to exceed budget as follows:

TS-1	\$27,750	Citgo Transgard Dexron III/Mercon	\$3.70	per	gallon	bulk
TS-1	\$10,175	Citgo Transgard Dexron III/Mercon	\$3.70	per	gallon	drum
TS-2	\$53,437.50	Mobil 1 Synthetic Transmission Fluid	\$14.25	per	gallon	bulk
TS-3	\$87,187.50	Castrol Transynd	\$23.25	per	gallon	drum
TS-7	\$63,085	Mobil Aero HF	\$9.25	per	gallon	drum
TS-8	\$1,270.50	Exxon Nuto H 46	\$3.30	per	gallon	drum
TS-9	\$12,852	Mobilube HD Plus 85W-140	\$5.95	per	pound	barrel
TS-10	\$3,141.60	Exxon Superflo 5W-30	\$3.57	per	gallon	drum
TS-11	\$2,352	Citgo Premium Lithium EP 2	\$.84	per	pound	barrel

The combined budgeted ceiling price is \$261,251.10, for the term of this contract

LUBRICATION PRODUCTS
For the term of November 4, 2004, through November 3, 2006

CONTRACT

This amount shall include costs for materials, delivery, and any other costs necessary to provide the lubrication products. The District and the Contractor must mutually agree upon any adjustments in payment. Invoice should be submitted by the Contractor in accordance with the delivery schedule of the contract, to AC Transit Accounts Payable, P.O. Box 28507, Oakland, CA. 94604 **Please reference the Contract Number and the Purchase Order Number on each invoice.**

5. ATTORNEY'S FEES

In the event that it becomes necessary for either party to bring a lawsuit to enforce any of the provisions of the Contract, the parties agree that the court having jurisdiction over such dispute shall have the authority to determine and fix reasonable attorney's fees to be paid to the prevailing party.

6. SEVERABILITY

If any provision of the Contract is declared void or unenforceable, such provision shall be deemed severed from this agreement, which shall otherwise remain in full force and effect.

7. BINDING EFFECT

All of the terms, provisions and conditions of the Contract hereunder shall be binding upon and inure the parties hereto and their respective successors, assigns and legal representatives.

8. ENTIRE AGREEMENT

This Contract represents the entire agreement of the parties with respect to the subject matter hereof, and all such agreements entered into prior hereto are revoked and superseded by this Contract, and no representations, warranties, inducements or oral agreements have been made by any of the parties except as expressly set forth herein, or in other contemporaneous written agreements.

This Contract may not be changed, modified or rescinded except in writing, signed by all parties hereto, and any attempt at oral modification of this Agreement shall be void and of no effect.

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LUBRICATION PRODUCTS

For the term of November 4, 2004, through November 3, 2006

CONTRACT

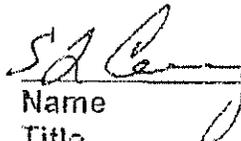
IN WITNESS WHEREOF, the parties have executed this Contract on the dates set forth below.

ALAMEDA-CONTRA COSTA
TRANSIT DISTRICT:

CONTRACTOR:


Rick Fernandez
General Manager

11/19/04
Date


SA [unclear]
Title

11-29-04
Date

Approved as to Form:


Kenneth O. Scheidig
General Counsel

11-16-04
Date

EXHIBIT - B

Bid summary prices revised per product approval 11-4-04

			9/28/2004			Western States Oil	Western States Oil	CL Bryant	CL Bryant	Golden Gate Petroleum	Golden Gate Petroleum	Bay Counties Pitcock Petroleum	Bay Counties Pitcock Petroleum	Coast Oil Co.
2004-879RTCC														
Santa Cruz Metropolitan Transit														
TS-1	ATF	Citgo Transgard Dexron III/Marcon	1450	gl	Bulk	\$3.7000	\$5,365.00	\$7.3000	\$10,585.00	\$6.5100	\$9,439.50	\$6.9700	\$10,106.50	No Quote
TS-2	SYNTHETIC ATF	Mobil 1 Synthetic Transmission Fluid		gl										
TS-3	SYNTHETIC ATF (TES-295)	Castrol TranSynd		gl										
TS-4	30W-40 ENG. OIL	Exxon XD-3 Oil 30W & 40W		gl										
TS-5	15W-40 ENG. OIL NAT. GAS	Citgo Pacemaker 1615 or nat gas 15W-4	350	gl	Bulk	\$5.1000	\$1,785.00	\$4.2500	\$1,487.50	\$8.3500	\$2,922.50	\$3.8500	\$1,347.50	No Quote
TS-6	15W-40 ENG. OIL CNG	Citgo Pacemaker 1615		gl										
TS-7	AVIATION HYDRAULIC FLUID	Mobil Aero HF		gl										
TS-8	ISO 46 HYDRAULIC FLUID	Exxon Nuto H 46		gl										
TS-9	85W-140 GEAR OIL	Mobilube HD Plus 85W-140	3200	lb	Barrels	\$0.5950	\$1,904.00	\$0.6750	\$2,160.00	\$0.7600	\$2,432.00	\$0.6900	\$2,208.00	No Quote
TS-10	5W-30 GAS ENGINE OIL (Drums)	Exxon Superflow 5W-30	165	gl	Drums	\$3.5700	\$589.05	\$3.7500	\$618.75	\$5.7700	\$952.05	\$3.2800	\$541.20	No Quote
TS-11	CHASSIS LUBRICANT (Barrels)	Citgo Premium Lithium EP 2		gl										
TS-12	WHEEL BEARING GREASE	Citgo Lithoplex MP 2	120	lb	Keg	\$1.0700	\$128.40	\$1.1000	\$132.00	\$1.1700	\$140.40	\$1.1050	\$132.60	No Quote
Totals							\$9,771.45		\$14,983.25		\$15,886.45		\$14,335.80	No Quote

EXHIBIT - B

2004-879RTCC						
Santa Cruz Metropolitan Transit						
		bulk		drum		barrels
TS-1	ATF	1450	gl		gl	lb
TS-2	SYNTHETIC ATF		gl		gl	lb
TS-3	SYNTHETIC ATF (TES-295)		gl		gl	lb
TS-4	30W-40 ENG. OIL		gl		gl	lb
TS-5	15W-40 ENG. OIL NAT. GAS	350	gl		gl	lb
TS-6	15W-40 ENG. OIL CNG		gl		gl	lb
TS-7	AVIATION HYDRAULIC FLUID		gl		gl	lb
TS-8	ISO 46 HYDRAULIC OIL		gl		gl	lb
TS-9	85W-140 GEAR OIL		gl		gl	3200 lb
TS-10	5W-30 GAS ENGINE OIL		gl	165	gl	lb
TS-11	CHASSIS LUBRICANT		gl		gl	120 lb
TS-12	WHEEL BEARING GREASE		gl			
	Totals					

					Western States Oil	Western States Oil	CL Bryant	CL Bryant	Golden Gate Petroleum	Golden Gate Petroleum	Bay Counties Pitcock Petroleum	Bay Counties Pitcock Petroleum	Coast Oil Co.	
2004-879RTCC			9/28/2004											
AC TRANSIT														
TS-1	ATF	Citgo Transgard Dexron III/Mercon	7500	gl	Bulk	\$3,7000	\$27,750.00	\$7,3000	\$54,750.00	\$6,5100	\$48,825.00	\$6,9700	\$52,275.00	No Quote
TS-1	ATF	Citgo Transgard Dexron III/Mercon	2750	gl	Drums	\$3,7000	\$10,175.00	\$7,3000	\$20,075.00	\$6,9900	\$19,222.50	\$6,9700	\$19,167.50	No Quote
TS-2	SYNTHETIC ATF	Mobil 1 Synthetic Transmission Fluid	3750	gl	Bulk	\$14,2500	\$53,437.50	\$15,2500	\$57,187.50	\$15,2000	\$57,000.00	\$14,0900	\$52,837.50	No Quote
TS-3	SYNTHETIC ATF (TES-295)	Castrol TranSynd	3750	gl	Bulk	\$23,2500	\$87,187.50	\$23,5000	\$88,125.00	\$16,9500	\$63,562.50	\$14,9000	\$55,875.00	No Quote
TS-4	30W-40 ENG. OIL	Exxon XD-3 Oil 30W & 40W			gl									
TS-5	15W-40 ENG. OIL NAT. GAS	Citgo Pacemaker 1615 or nat.gas 15W-40			gl									
TS-6	15W-40 ENG. OIL CNG	Citgo Pacemaker 1615			gl									
TS-7	AVIATION HYDRAULIC FLUID	Mobil Aero HF	6820	gl	Drums	\$9,2500	\$63,085.00	\$9,5000	\$64,790.00	\$10,5500	\$71,951.00	\$8,7900	\$59,947.80	No Quote
TS-8	ISO 46 HYDRAULIC FLUID	Exxon Nuto H 46	385	gl	Drums	\$3,3000	\$1,270.50	\$2,9500	\$1,135.75	\$4,9000	\$1,886.50	\$2,5800	\$993.30	No Quote
TS-9	85W-140 GEAR OIL	Mobilube HD Plus 85W-140	21600	lb	Barrels	\$0,5950	\$12,852.00	\$0,6750	\$14,580.00	\$0,7600	\$16,416.00	\$0,6900	\$14,904.00	No Quote
TS-10	5W-30 GAS ENGINE OIL (Drums)	Exxon Superflow 5W-30	880	gl	Drums	\$3,5700	\$3,141.60	\$3,7500	\$3,300.00	\$5,7700	\$5,077.60	\$3,2800	\$2,886.40	No Quote
TS-11	CHASSIS LUBRICANT (Barrels)	Citgo Premium Lithium EP 2	2800	gl	Barrels	\$0,8400	\$2,352.00	\$1,1000	\$3,080.00	\$1,1700	\$3,276.00	\$1,0420	\$2,917.60	No Quote
TS-12	WHEEL BEARING GREASE	Citgo Lithoplex MP 2			lb									
Totals							\$261,251.10		\$307,023.25		\$287,217.10		\$261,804.10	No Quote

			9/28/2004		Western States Oil	Western States Oil	CL Bryant	CL Bryant	Golden Gate Petroleum	Golden Gate Petroleum	Bay Counties Pitcock Petroleum	Bay Counties Pitcock Petroleum	Coast Oil Co.	
2004-879RTCC														
Golden Gate Transit														
TS-1	ATF	Citgo Transgard Dexron III/Mercon	55	gls	Drums	\$3.7000	\$203.50	\$7.3000	\$401.50	\$6.9900	\$384.45	\$6.9500	\$382.25	No Quote
TS-2	SYNTHETIC ATF	Mobil 1 Synthetic Transmission Fluid		gls					\$0.00					
TS-3	SYNTHETIC ATF (TES-295)	Castrol TranSynd	275	gls	Drums	\$23.2500	\$6,393.75	\$23.5000	\$6,462.50	\$16.9500	\$4,661.25	\$14.5900	\$4,012.25	No Quote
TS-4	30W-40 ENG. OIL	Exxon XD-3 Oil 30W & 40W	495	gls	Drums	\$3.6500	\$1,806.75	\$3.6000	\$1,782.00	\$5.8800	\$2,910.60	\$3.6200	\$1,791.90	No Quote
TS-5	15W-40 ENG. OIL NAT. GAS	Citgo Pacemaker 1615 or nat.gas 15W-40		gls										
TS-6	15W-40 ENG. OIL CNG	Citgo Pacemaker 1615		gls										
TS-7	AVIATION HYDRAULIC FLUID	Mobil Aero HF	55	gls	Drums	\$9.2500	\$508.75	\$9.5000	\$522.50	\$10.5500	\$580.25	\$8.8500	\$486.75	No Quote
TS-8	ISO 46 HYDRAULIC FLUID	Exxon Nuto H 46		gls					\$0.00					
TS-9	85W-140 GEAR OIL	Mobilube HD Plus 85W-140	12000	lbs	Barrels	\$0.5950	\$7,140.00	\$0.6750	\$8,100.00	\$0.7600	\$9,120.00	\$0.6690	\$8,028.00	No Quote
TS-10	FW-30 GAS ENGINE OIL	Exxon Superflow 5W-30	550	gls	Drums	\$3.5700	\$1,963.50	\$3.7500	\$2,062.50	\$5.7700	\$3,173.50	\$3.3200	\$1,826.00	No Quote
TS-11	CHASSIS LUBRICANT	Citgo Premium Lithium EP 2	275	gls	Barrels	\$0.8400	\$231.00	\$1.1000	\$302.50	\$1.1700	\$321.75	\$1.1050	\$303.88	No Quote
TS-12	WHEEL BEARING GREASE	Citgo Lithoplex MP 2	240	lbs	Keg	\$1.0700	\$256.80	\$1.1000	\$264.00	\$1.1700	\$280.80	\$1.1050	\$265.20	No Quote
Totals							\$18,504.05		\$19,897.50		\$21,432.60		\$17,096.23	No Quote

EXHIBIT -C-

INVITATION FOR BIDS

SIGN AND RETURN THIS PAGE

AC TRANSIT DISTRICT
Purchasing Department
10626 International Blvd.
Oakland, CA 94603

CONTRACT PROPOSAL NO.: 2004-879RTCC

Date: August 17, 2004

TITLE: LUBRICATION PRODUCTS

BIDS WILL BE OPENED at 10626 International Blvd. by 2 P.M. September 28, 2004

Sign the bid, put it in an envelope, and write the Contract Bid number and Title on the outside. Sign and return this page. Retain Bidder's Duplicate copy for your files.

DO NOT INCLUDE SALES OR EXCISE TAXES in Bid prices.

ALL BIDDERS COMPLETE THIS SECTION:

2004

Upon execution of a Contract Acceptance form, the undersigned agrees to furnish, subject to provisions on the reverse of this form, all articles or services within the dates specified, in the manner and at the prices stated, in accordance with the advertisement, specifications, proposal, special conditions and general conditions, all of which are made part of the contract proposal, when authorized by Purchase Order, Contract Order, or Letter of Agreement issued by the District.

Name under which business is conducted: WESTERN STATES OIL COMPANY
Business street address: 1790 S. 10TH ST. Telephone: 408 292-1041
SAN JOSE CA 95112
City State Zip Code

IF SOLE OWNER, sign here:

I sign as sole owner of the business named above:

Signed _____ Typed Name _____

IF PARTNERSHIP OR JOINT VENTURE, sign here:

The undersigned certify that we are partners in the business (joint venture) named above and that we sign this contract proposal with full authority to do so (one or more partners sign):

Signed _____ Typed Name _____

Signed _____ Typed Name _____

IF CORPORATION, sign here:

The undersigned certify that they sign this contract proposal with full authority to do so:

Corporate Name: TOM LOPES DIST. INC (dba WESTERN STATES OIL Co.)

Signed _____ Typed Name _____ Title _____

Signed [Signature] Typed Name E.L. CURRY Title GM

Incorporated under the laws of the State of CA

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

BID FORM

Estimated yearly usage of Lubricant Products

AC Transit

	TS-1	TS-2	TS-3	TS-4	TS-5	TS-6	TS-7	TS-8	TS-9	TS-10	TS-11	TS-12
Bulk Quantities	7500gl	3750gl	3750gl									
Unit cost	3.70 x	14.25 x	19.00 x									
Totals	\$27,750	\$53,437.50	\$71,250									
Drum (55 gl) rate	2750gl						6820gl	385gl		880gl		
Barrel (per lb) rate									21,600lb		2800lb	
Unit cost	x 3.70						x 8.05	x 3.30	x .595	x 3.57	x .84	
Totals	\$10,175						\$54,901	\$1,270.50	\$12,852	\$3,141.60	\$2,352	

- TS-1 AUTOMATIC TRANSMISSION FLUID, (MINERAL BASE) - CITGO TRANSGARD DEXRON III / MERCON
- TS-2 SYNTHETIC AUTOMATIC TRANSMISSION FLUID - MOBIL 1 SYNTHETIC ATF
- TS-3 SYNTHETIC AUTOMATIC TRANSMISSION FLUID, (TES-295 APPROVAL) - CITGO QUATRASYN SYNTHETIC TRANSMISSION FLUID
- TS-4 HEAVY DUTY DIESEL ENGINE OIL 30W & 40W ENGINE OIL REQUIREMENTS EXXON XD-3 30W & 40W ENGINE OIL
- TS-5 CUMMINS HEAVY DUTY NATURAL GAS/ LPG ENGINE OIL 15W-40 ENGINE OIL REQUIREMENTS - CITGO PACEMAKER 1615 OR CITGO CITCARD
- TS-6 DETROIT DIESEL APPROVED HEAVY DUTY 15W-40 CNG ENGINE OILS - CITGO PACEMAKER 1615 NATURAL GAS 15W-40
- TS-7 AVIATION HYDRAULIC FLUID - CHEVRON AVIATION HYDRAULIC FLUID A
- TS-8 ISO 46 HYDRAULIC OIL - EXXON NUTO H 46
- TS-9 HEAVY DUTY GEAR OIL, SAE 85W-140 MOBILUBE HD PLUS 85W-140
- TS-10 GASOLINE ENGINE MULTIGRADE ENGINE OIL 5W-30 EXXON SUPERFLO 5W-30
- TS-11 CHASSIS LUBRICANT - CITGO PREMIUM LITHIUM EP2
- TS-12 WHEEL BEARING GREASE - CITGO LITHOPLEX MP 2

NOTE

② IF CHEVRON AVIATION HYDRAULIC A NOT APPROVED BY AC TRANSIT, THEN SUBSTITUTE MOBIL AERO HF @ \$9.25/GAL.

NOTE

① IF CITGO QUATRASYN NOT APPROVED BY A.C. TRANSIT FOR TS-3, THEN SUBSTITUTE CASTROL TRANSYND @ \$23.25/GAL.

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

BID FORM

Estimated yearly usage of Lubricant Products

Golden Gate Transit

	TS-1	TS-2	TS-3	TS-4	TS-5	TS-6	TS-7	TS-8	TS-9	TS-10	TS-11	TS-12
Bulk Quantities												
Unit cost												
Totals												
Drum (55 gl) rate	55 gl		275gl	495gl			55gl			550gl	275gl	
Barrel (per lb) rate									12000lb			240lb
Unit cost	x 3.70		x 19.00	x 3.65			x 8.05		x .595	x 3.57	x .84	x 1.07
Totals	\$203.50		\$5,225	\$1,806.75			\$442.75		\$7,140	\$1,963.50	\$231	\$256.80

- TS-1 AUTOMATIC TRANSMISSION FLUID, (MINERAL BASE)
- TS-2 SYNTHETIC AUTOMATIC TRANSMISSION FLUID
- TS-3 SYNTHETIC AUTOMATIC TRANSMISSION FLUID, (TES-295 APPROVAL)
- TS-4 HEAVY DUTY DIESEL ENGINE OIL 30W & 40W ENGINE OIL REQUIREMENTS
- TS-5 CUMMINS HEAVY DUTY NATURAL GAS/ LPG ENGINE OIL 15W-40 ENGINE OIL REQUIREMENTS
- TS-6 DETROIT DIESEL APPROVED HEAVY DUTY 15W-40 CNG ENGINE OILS
- TS-7 AVIATION HYDRAULIC FLUID
- TS-8 ISO 46 HYDRAULIC OIL
- TS-9 HEAVY DUTY GEAR OIL, SAE 85W-140
- TS-10 GASOLINE ENGINE MULTIGRADE ENGINE OIL 5W-30
- TS-11 CHASSIS LUBRICANT
- TS-12 WHEEL BEARING GREASE

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

BID FORM

Estimated yearly usage of Lubricant Products

Santa Cruz Metropolitan Transit

	TS-1	TS-2	TS-3	TS-4	TS-5	TS-6	TS-7	TS-8	TS-9	TS-10	TS-11	TS-12
Bulk Quantities	1450gl				350gl							
Unit cost	x 3.70				x 5.10							
Totals	\$ 5,365				\$ 1,785							
Drum (55 gl) rate										165gl		
Barrel (per lb) rate									3200lb			120lb
Unit cost									x .595	x 3.57		x 1.07
Totals									\$ 1,904	\$ 589.50		\$ 128.40

TS-1 AUTOMATIC TRANSMISSION FLUID, (MINERAL BASE)

TS-2 SYNTHETIC AUTOMATIC TRANSMISSION FLUID

TS-3 SYNTHETIC AUTOMATIC TRANSMISSION FLUID, (TES-295 APPROVAL)

TS-4 HEAVY DUTY DIESEL ENGINE OIL 30W & 40W ENGINE OIL REQUIREMENTS

TS-5 CUMMINS HEAVY DUTY NATURAL GAS/ LPG ENGINE OIL 15W-40 ENGINE OIL REQUIREMENTS

TS-6 DETROIT DIESEL APPROVED HEAVY DUTY 15W-40 CNG ENGINE OILS

TS-7 AVIATION HYDRAULIC FLUID

TS-8 ISO 46 HYDRAULIC OIL

TS-9 HEAVY DUTY GEAR OIL, SAE 85W-140

TS-10 GASOLINE ENGINE MULTIGRADE ENGINE OIL 5W-30

TS-11 CHASSIS LUBRICANT

TS-12 WHEEL BEARING GREASE

Facsimile Cover Sheet

To: Al DeNurra
Company: A C Transit
Phone: 510/577-8809
Fax: 510/577-8809
3

From: Lee Curry
Company: Western States Oil Company
Phone: 408/351-2322 925/200-9270-cell
Fax: 408/298-6784

Date: 9/30/04

**Pages including this
cover page:** 6

Attached per your request to Everett Yee is a copy of the Voith Service Bulletin #013O. The transmission fluids used in our bid were Citgo Transgard ATF Dexron III / Mercon for TS-1 (#9 in Voith SB #013O) and Mobil 1 Synthetic ATF for TS-2 (#18 in Voith SB #013O).

I spoke with Stuart Hoffman on the telephone yesterday and have since contacted the oil manufacturers (Citgo Petroleum and ExxonMobil Corp.) to secure the additional information to support the products we bid. This information will be forthcoming shortly.

The product we proposed for TS-3 (Citgo Quatrasyn Transmission Fluid) may require a meeting with your technical folks. The Citgo technical representative has reserved Thursday or Friday (10/7-8) if necessary. If A C Transit does not approve the Citgo Quatrasyn for TS-3, then our proposed product is the Castrol Transynd which we also included in the bid. My objective is to bring forth the optimal products for your consideration.

Thank you.

C: Everett Yee

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GAS • DIESEL • LUBES

Western States Oil Company
Service Fuel and Lubricants Distributor



Lee Curry, General Manager
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Industrial Oils
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Transgard ATF
Vacuum Pump Oils
Compressor Oils
Cutting Fluids
Gas Engine Oils
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GASOLINE
DIESEL
MOTOR OILS

September 27, 2004

AC Transit District
Purchasing Department
10626 International Blvd
Oakland CA 94603

Title: Lubrication Products
Contract Bid #2004-879RTCC

Thank you for the opportunity to present our lubrication proposal. The table shows the proposed product, package style and price (product data sheets and MSDS attached).

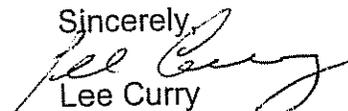
TS #	Proposed Product	Package Style	Price
1	Citgo Transgard Dexron III / Mercon	Bulk/Drum	\$ 3.70 /G
2	Mobil 1 Synthetic ATF	Bulk	\$14.25 /G
3	Citgo Quatrasyn Synthetic Transmission Fluid	Bulk/Drum	\$19.00 /G
*3	Castrol TranSynd	Bulk/Drum	\$23.25 /G
4	Exxon XD-3 Engine Oil 30W & 40W	Drum	\$ 3.65 /G
5	Citgo Pacemaker 1615 or Citgo Citgard Natural Gas 15W-40	Bulk/Drum	\$ 5.10 /G
6	Citgo Pacemaker 1615	Bulk/Drum	\$ 5.10 /G
7	Chevron Aviation Hydraulic Fluid A	Drum	\$ 8.05 /G
*7	Mobil Aero HF	Drum	\$ 9.25 /G
8	Exxon Nuto H 46	Drum	\$ 3.30 /G
9	Mobilube HD Plus 85W-140	Drum	\$0.595 /LB
10	Exxon Superflo 5W-30	Drum	\$ 3.57 /G
11	Citgo Premium Lithium EP 2	Drum	\$ 0.84 /LB
12	Citgo Lithoplex MP 2	Keg	\$ 1.07 /LB

* TS-3 – If Citgo Quatrasyn not approved by A C Transit use Castrol TranSynd
TS-7 – If Chevron Aviation Fluid A not approved by A C Transit use Mobil Aero HF

Payment terms are 2% - 15 days, net 30 days. Pricing is on a delivered basis and excludes applicable excise taxes and sales tax.

Western States Oil Company is a Minority Business Enterprise pursuant to California Public Utilities Commission General Order 156, copy attached.

It is our commitment to provide quality products, technical support and friendly service that exceed your expectations. Should you have any questions or need additional information, please contact me @ 408/292-1041. Thank you for your consideration.

Sincerely,

Lee Curry
General Manager



Women Minority Business Enterprise Clearinghouse
Public Utilities Commission - State of California

January 25, 2002

STIEVE LOPES
WESTERN STATES OIL, CO.
1790 S. 10TH STREET
SAN JOSE, CA 95112-

CHS Verification Order Number: 98FN0022

In accordance with General Order 156 and the Clearinghouse Operational Guidelines, WMBE status has been verified and approved for your firm, as follows:

MBE

This status enables your firm to participate as a WMBE, in procurement programs for the public utilities doing business in the State of California who are signatories to the WMBE Clearinghouse

This verification status is valid with the following conditions:

- (1) You must notify the Clearinghouse of any change in ownership and/or control of your firm within 30 days of the change. Failure to notify the Clearinghouse violates section 8285 of the Public Utilities Code which is cited in the application.
- (2) The Clearinghouse may reconsider your WMBE status:
 - (a) If it is determined that such status was knowingly obtained by false, misleading or incorrect information.
 - (b) If, in a formal opinion, the California Public Utilities Commission determines that the WMBE verification criteria under which you were deemed to be eligible is no longer valid.
- (3) The Clearinghouse may request additional information or conduct on-site visits at any time during the term of your verification.
- (4) If the Clearinghouse verifies you under the Comparable Agency Verification process, you must submit proof of recertification by the comparable agency prior to the comparable agency's expiration date to maintain eligibility. Please note, however, that WMBEs are required to submit application forms at least once every three years. Due to this stipulation, the expiration date of the attached certificate may not match the date of your comparable agency certificate.

We wish you success in your future business development.

Karen Woo
VERIFICATION ANALYST

David Moulton
PROJECT DIRECTOR

WMBE CLEARINGHOUSE - Administered by ASIAN, Inc. pursuant to PUC General Order 156

1670 Pine Street
San Francisco, CA 94109
Toll Free: 800-359-7998
Tel: 415-928-6892 Fax: 415-921-0182

4605 Lankershim Blvd., Ste 418
North Hollywood, CA 91602
Toll Free: 800-869-7385
Tel: 818-623-9797 Fax: 818-623-9799

WOMEN & MINORITY BUSINESS ENTERPRISE (WMBE)
CLEARINGHOUSE

CERTIFICATE OF ELIGIBILITY

VERIFICATION EXPIRATION DATE: 1/24/05

The Women & Minority Business Enterprise (WMBE) Clearinghouse hereby certifies that it has audited and verified the eligibility of WESTERN STATES OIL CO. of SAN JOSE, CA as a MBE pursuant to California Public Utilities Commission (CPUC) General Order 156 and the terms and conditions stipulated in the Verification Application Package. This Certificate shall be valid only with the Clearinghouse seal affixed hereto.

Eligibility must be maintained at all times and renewed within thirty (30) days upon any changes of ownership or control. The Clearinghouse may reconsider WMBE status if it is determined that such status was obtained by false, misleading or incorrect information. Failure to comply may violate Section 8285 of the Public Utilities Code cited in the Verification Application which can result in a denial of eligibility. Deverification may occur if, in a formal opinion, the California Public Utilities Commission determines that a WMBE Verification criterion under which eligibility was awarded becomes invalid. The Clearinghouse may request additional information or conduct on-site visits during the term of verification to verify eligibility.

This certification is valid only for the period that the above named firm remains eligible as determined by the Clearinghouse. Utility companies may direct inquiries concerning this Certificate to the WMBE Clearinghouse at (800)869-7385 in Los Angeles and (800)359-7998 in San Francisco.

WON:98FN0022

January 25, 2002



Voith Turbo

DIWA Service Bulletin

Service Bulletin #0130
Replaces Service Bulletin #013N

Issued Date: July 06, 2004
Revised Date: July 06, 2004

Transmissions: All DIWA

Subject: Automatic Transmission Fluids (ATF) for DIWA Transmissions – Approved Oils and Change Intervals

Purpose: This document provides a detailed list of Approved ATF Oils for use in the Voith transmission for all DIWA models, procedures to approve additional oils for use, guide lines on oil change intervals, information on extended oil change intervals.

Reference: AN #55.6335.32 & 55.6336.32 (NOT relevant to North America)

APPROVED OILS

See Approved Automatic Transmission Fluid list on page 4 of this service bulletin. Note: This list is current as of the revision date found in the header of this document and may be changed as new oil information becomes available.

NOTE: USE OF OILS NOT ON THE APPROVED TRANSMISSION FLUID LIST COULD HAVE ADVERSE EFFECTS ON THE TRANSMISSION AND VOID WARRANTY.

ADDITIONAL OIL APPROVAL PROCEDURES

If the oil you are using is not on the approved list:

1. Have your oil supplier fill out the "Data Sheet for Automatic Transmission Fluids", which is the last page of this document. **Note: if all spaces for the required information on this sheet are not filled in completely the application will be rejected and returned to you.**
2. Submit the completed form to Voith Turbo, Inc. for approval consideration along with a 1 pint sample of the virgin oil and a laboratory analysis report on the original product. The analysis will cover the following items: Acid Number (ASTM D664 mod), Viscosity at 40 and 100 deg C, Metals (Fe, Al, Cr, Cu, Pb, Sn, Ni, Ag, Si, Na, B, Zn, P, Ca, Mg, Ba, Mo, K) **All information supplied will be kept strictly confidential.**
3. Voith will notify you of approval/non-approval after review

Oil and Filter Drain Intervals on DIWA.2 and DIWA.3 Transmissions with Spin-on Filters Installed.

36,000 Mile Oil Change Intervals are defined in the attached list:

1. Use of a **36,000 MILE MINERAL BASE OR SEMI-SYNTHETIC TRANSMISSION FLUID:**
 - a. The Oil Change interval is **36,000 MILES OR 1 (ONE) YEAR**, whichever comes first
 - b. The spin-on Filter Change interval is **18,000 MILES OR 6 (SIX) MONTHS**, whichever comes first



Voith Turbo

DIWA Service Bulletin

Service Bulletin #013O
Replaces Service Bulletin #013N

Issued Date: July 06, 2004
Revised Date: July 06, 2004

72,000 Mile Oil Change Intervals are defined in the attached list:

2 Use of a **72,000 MILE SYNTHETIC TRANSMISSION FLUID**;

- a. The **Oil Change** interval is **72,000 MILES OR 2 (TWO) YEARS**, whichever comes first.
- b. **Filter Change** interval is **18,000 MILES OR 6 (SIX) MONTHS**, which ever comes first.

3 Requirements for 72,000 mile oil change intervals while units are in warranty:

- a. Oil sampling and analysis of the ATF for each transmission at the oil filter change (18,000 miles maximum)
- b. Analysis results are compared to the standards established in Service Bulletin Number 4A
- c. If irregularities are found in the oil, follow resample guidelines provided by your analysis company.
- d. If irregularities continue in future oil samples, your oil analysis company will recommend the course of action. This may include pulling the oil pan and conducting a bottom end inspection of the transmission
- e. In the event there is a warrantable problem with the transmission, Voith Turbo, Inc will require the following information for evaluation:
 - i. A copy of the current oil analysis along with the past three analysis reports for comparison and evaluation **ALL** oil analysis sheets must be available for evaluation by Voith **Failure or inability to provide these records will result in voiding of all warranties. THERE WILL BE NO EXCEPTIONS.**
 - ii. Oil type {Company Name, Product Name & Approval Number (If available)}

Oil and Filter Drain Intervals on All Newly Delivered and Newly Rebuilt Transmissions.

Oil and filter changes for new and rebuilt transmissions are outlined as follows:

- 1 Initial Oil and Filter Changes are made at the time of receipt of the vehicle or rebuild of transmission up to a **maximum of 2,500 miles**
- 2. The second oil and filter changes are made at a maximum of 9,000 miles after the first oil and filter change **up to 11,500 miles maximum.**
- 3 Standard or extended oil change intervals will commence after the second oil and filter change

NOTE: By using a genuine Voith oil filter, you are ensured of proper oil filtration and protection of your transmission.

NOTE: Updates to the approval list will be provided in future releases of Service Bulletin 13.



Voith Turbo

DIWA Service Bulletin

Service Bulletin #0130
Replaces Service Bulletin #013N

Issued Date: July 06, 2004
Revised Date: July 06, 2004

Oil and Filter Drain Intervals on DIWA.3E Transmissions with Filter Installed in Oil Pan.

36,000 Mile Oil Change Intervals are defined in the attached list:

1. Use of a 36,000 MILE MINERAL BASE OR SEMI-SYNTHETIC TRANSMISSION FLUID;

- a. The Oil Change interval is 36,000 MILES OR 1 (ONE) YEAR, whichever comes first
- b. Filter Change interval is 36,000 MILES OR 6 (SIX) MONTHS, whichever comes first

72,000 Mile Oil Change Intervals are defined in the attached list:

2. Use of a 72,000 MILE SYNTHETIC TRANSMISSION FLUID;

- a. The Oil and Filter Change interval is 72,000 MILES OR 2 (TWO) YEARS, whichever comes first
- b. Filter Change interval is 72,000 MILES OR 2 (TWO) YEARS, whichever comes first.

PLEASE NOTE ABOVE: These transmissions have an internal filter. This type of filter has NO separate change interval from the oil. The filter MUST be changed in accordance with your oil changes intervals.



Voith Turbo

DIWA Service Bulletin

Service Bulletin #0130
Replaces Service Bulletin #013N

Issued Date: July 06, 2004
Revised Date: July 06, 2004

For Voith model transmissions: DIWA D851.2&.3 & .3E; D854.2&.3; D854G; D863.2&.2W7; &.3; D864.3 &.3E; D864G and D884.3E

Note: The information contained on this list is certified to be current as of the date listed in the issued document field and is accurate only to the limits of the information supplied by the oil manufactures and on file with Voith Turbo In York PA as the revised document date. This list may be changed or modified at any time without notice if the technical information regarding the oils and supplied to Voith by the oil manufacturers is updated or modified by the oil manufacturers.

	COMPANY NAME (Marketer)	BRAND NAME	Approval Number	Class Base	Drain Interval
1	76 Lubricants	76 Mercon V ATF	H36011	Mineral	36,000
2	Amsoil Inc.	Amsoil ATF	E25112	Synthetic	72,000
3	BP Oil and Exploration	Autran Dexron III®/ Mercon	F30135	Mineral	36,000
4	Castrol Ltd. Heavy Duty Lube	TranSynd ATF	G34010	Synthetic	72,000
5	Chevron Texaco Global Lubricants	Chevron Synthetic ATF Heavy Duty	G34090	Synthetic	36,000
6	Chevron Texaco Global Lubricants	Texaco Synthetic ATF Heavy Duty	G34090	Synthetic	36,000
7	Chevron Texaco Global Lubricants	Chevron ATF MERCON V	G 34555	Mineral	36,000
8	Chevron Texaco Global Lubricants	Texaco Havoline ATF MERCON V	G34555	Mineral	36,000
9	Citgo Petroleum Corporation	Transgard Dexron® III/ Mercon	G34059	Mineral	36,000
10	Coastal Unilube Inc.	Coastal Dexron III/ Mercon	F30310	Mineral	36,000
11	Cofram Lubricants	Sintofluid	ISO 46-GL4	Semi-Synthetic	36,000
12	Cognis Corp	Emgard 2803 Synthetic ATF	G34494	Synthetic	36,000
13	Conoco Phillips	Mercon V ATF	H36011	Mineral	36,000
14	Delta Petroleum Co.	Mercon V2000	G 34095	Mineral	36,000
15	Exxon Mobil Corp Fairfax Va.	Aamco Synthetic Blend ATF	G34015	Mineral	36,000
16	Exxon Mobil Corp Fairfax Va.	Superflow Synthetic ATF	G34015	Mineral	36,000
17	Exxon Mobil Corp Fairfax Va.	Mobile ATF 220	D21611	Mineral	36,000
18	Exxon Mobil Corp Fairfax Va.	Mobil 1 Synthetic ATF	G34036	Synthetic	36,000
19	Fuchs Lubricants Co	Sintofluid III MTA	H36310	Synthetic	72,000
20	Fuchs Lubricants Co	Titan ATF 3000	D22173	Mineral	36,000
21	Fuchs Lubricants Co	Titan ATF 4000	F30105	Mineral	36,000
22	Fuchs Lubricants Co	Titan ATF 5000	E25112	Synthetic	72,000
23	Kendall	Mercon V ATF	H36011	Mineral	36,000
24	Petro Canada Lubricants	Petro Canada ATF	H36007	Synthetic	72,000
25	Phillips 66	Mercon V ATF	H36011	Mineral	36,000
26	Shell Canada	Donax TG	G34026	Mineral	36,000

VOITH TURBO	Data sheet for Automatic Transmission Fluids																																			
<p>For use in transmissions DIWA, DIWA.2, DIWA.3, DIWA.3E, DIWA.5</p> <p>Basically, only oils according to Dexron II or Dexron III specification are approved for use in our transmissions. The introduction into our "Service Bulletin 13. will be done according to the data received by the oil marketer without further tests Oils that do not correspond with the above mentioned specifications will not be accepted.</p> <p>The following details are required:</p> <p>General data</p> <p>oil marketer: _____ name of product: _____</p> <p>base oil: compound _____ mass _____ [%] base oil 1: _____ [%] base oil 2: _____ [%] base oil 3: _____ [%] base oil 4: _____ [%]</p> <p>additive manufacturer: _____ Dexron-no II or III: _____ Package no: _____ [%]</p> <p>Rebrand / Reblend of: _____</p> <p>Market region: Europe <input type="checkbox"/> North America <input type="checkbox"/> South America <input type="checkbox"/> Africa <input type="checkbox"/> Asia/Australia <input type="checkbox"/></p> <p>Characteristic values</p> <p>apparent viscosity at -40°C acc. to DIN 51398 (Brookfield): _____ [mPa.s] kinematic viscosity acc to DIN 51662 at 40°C: _____ [mm²/s] at 100 °C: _____ [mm²/s] Index of viscosity acc to DIN ISO 2909: _____ [-] total acid number TAN acc to ASTM D 664: _____ [mgKOH/g] flash point acc to Cleveland and DIN ISO 2592: _____ [°C]</p> <p>Test results</p> <p>FZG Test A/B, 3/90 (DIN 51354) achieved failure load stage (min. L5 11): _____ [LS] KV @ 100°C (=212°F) after shear (DIN 51350-6 KRL/C) (min 5.3 mm²/s): _____ [mm²/s] Freudenberg Test with materials ACM 80 and FPM 80 at 168 h / 95 °C (= 203 °F) and 150 °C (= 302 °F):</p> <table border="1" style="width:100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th></th> <th>new</th> <th>168 h / 95° (203°F)</th> <th>new</th> <th>168 h / 150° (302°F)</th> </tr> </thead> <tbody> <tr> <td>ACM 80</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Hardness [Shore]</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Volume [%]</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>FPM 80</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Hardness [Shore]</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Volume [%]</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Deviations from materials and test conditions are to be stated respectively</p> <p>If the stated information corresponds with our required data, the ATF will be introduced into our "Lists of Lubricants" and it will be approved in written form. The approval is limited to 24 months. After written confirmation given to Voith, that the product has not changed, a new approval for further 24 months is done.</p> <p>Safety instruction: Each change of components of the product referring to base oil, additive package or added components will terminate the approval. It may be re-approved after a new audit by Voith.</p> <p>Date: _____ Signature: _____</p>			new	168 h / 95° (203°F)	new	168 h / 150° (302°F)	ACM 80					Hardness [Shore]					Volume [%]					FPM 80					Hardness [Shore]					Volume [%]				
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Voith Turbo GmbH & Co KG D-89522 Heidenheim	DIWA	55.8252.16 2004-03																																		



Sunday, October 03, 2004

To: Al DeNurra-AC Transit

Reference: CITGO Product Data for AC Transit Bid

You requested additional data on CITGO products bid by Western States Oil Company.

- 1. TS-1 Automatic Transmission Fluid, Mineral Base:
 - a. GM Lic. # G34059
 - b. Voith approval number-based on GM Lic. #G34059 (See Attached Voith Service Bulletin #0130
 - c. Allison C-4 Approval-C4-29903800
- 2. TS-3 Replacement-Synthetic Automatic Transmission Fluid
 - a. QuatraSyn-See attached data
 - b. Equivalent to or exceeds Allison TES-295 requirements
- 3. TS-5 Cummins Heavy Duty Natural Gas/LPG Engine Oil 15W-40 Specifications-See attached approval letters

Specifications	Pacemaker 1615	Citgard Natural Gas Engine Oil 15W-40
Sulfated Ash	.45	.55
TBN	5.4	5.2
TAN	.5	.8
Phosphorus	270	702
Zinc	330	778
Calcium	1300	1200
Copper Corrosion	NA	1A
Lead Increase	NA	<50
Tin Increase	NA	<20

See attached Product Information Sheets on the above CITGO products.


 Roger Littlejohn
 Technical Services Manager
 CITGO Petroleum

VOITH**Voith Turbo****DIWA Service Bulletin**

Service Bulletin #0130
Replaces Service Bulletin #013N

Issued Date: July 06, 2004
Revised Date: July 06, 2004

For Voith model transmissions: DIWA D851.2&.3 & .3E; D854.2&.3; D854G; D863.2&.2W7; &.3; D864.3 &.3E; D864G and D884.3E

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	COMPANY NAME (Marketer)	BRAND NAME	Approval Number	Class Base	Drain Interval*
1	76 Lubricants	76 Mercon V ATF	H36011	Mineral	36,000
2	Amsoil Inc.	Amsoil ATF	E25112	Synthetic	72,000
3	BP Oil and Exploration	Autran Dexron III/ Mercon	F30135	Mineral	36,000
4	Castrol Ltd. Heavy Duty Lube	TranSynd ATF	G34010	Synthetic	72,000
5	Chevron Texaco Global Lubricants	Chevron Synthetic ATF Heavy Duty	G34090	Synthetic	36,000
6	Chevron Texaco Global Lubricants	Texaco Synthetic ATF Heavy Duty	G34090	Synthetic	36,000
7	Chevron Texaco Global Lubricants	Chevron ATF MERCON V	G 34555	Mineral	36,000
8	Chevron Texaco Global Lubricants	Texaco Havoline ATF MERCON V	G34555	Mineral	36,000
9	Citgo Petroleum Corporation	Transgard Dexron® III/ Mercon	G34059	Mineral	36,000
10	Coastal Unilube Inc.	Coastal Dexron III/ Mercon	F30310	Mineral	36,000
11	Cofram Lubricants	Sintofluid	ISO 46-GL4	Semi-Synthetic	36,000
12	Cognis Corp	Emgard 2803 Synthetic ATF	G34494	Synthetic	36,000
13	Conoco Phillips	Mercon V ATF	H36011	Mineral	36,000
14	Delta Petroleum Co.	Mercon V2000	G 34095	Mineral	36,000
15	Exxon Mobil Corp Fairfax Va.	Aamco Synthetic Blend ATF	G34015	Mineral	36,000
16	Exxon Mobil Corp Fairfax Va.	Superflow Synthetic ATF	G34015	Mineral	36,000
17	Exxon Mobil Corp Fairfax Va.	Mobile ATF 220	D21611	Mineral	36,000
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25	Phillips 66	Mercon V ATF	H36011	Mineral	36,000
26	Shell Canada	Donax TG	G34026	Mineral	36,000

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OIL SUPPLIER	PRODUCT BRAND
CHEVRON U.S.A. INC.	CHEVRON RPM DELO MOTOR OIL SAE 15W-4
CHEVRON U.S.A. INC.	CHEVRON RPM HDMO SAE 15W-40
CHEVRON U.S.A. INC.	CHEVRON DELO 400 PLUS MOTOR OIL SAE 5
CHEVRON U.S.A. INC.	CHEVRON DELO 400 SAE 30
CHEVRON U.S.A. INC.	CHEVRON DELO 400 SAE 30
CHEVRON U.S.A. INC.	CHEVRON RPM DELO MOTOR OIL SAE 30
CHEVRON U.S.A. INC.	CHEVRON RPM HDMO SAE 30
CHEVRON U.S.A. INC.	CHEVRON AUTOMATIC TRANSMISSION FLUI
CHEVRON U.S.A. INC.	CHEVRON DRIVE TRAIN FLUID HD
CHEVRON U.S.A. PRODUCTS CO.	CHEVRON AUTOMATIC TRANSMISSION FLUI
CHEVRON U.S.A. PRODUCTS CO.	CHEVRON AUTOMATIC TRANSMISSION FLUI
CHRYSLER CANADA LTD.	CHRYSLER MOPAR TURBO XD 15W-40 DIESEL
CHRYSLER CANADA LTD.	MOPAR TURBO XD 15W-40 DIESEL ENGINE C
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCOI
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCOI
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCOI
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCOI
CIA BRASIL DE PETROLEO	ULTRAMO TURBO 30
CIA.BRASILLEIRA PETROLEO IPIRANGA	ISAMATIC III
CITGO PETROLEUM CORP.	CITGO TRANSPower FLUID, 10W
CITGO PETROLEUM CORP.	CITGO TRANSPower FLUID, SAE 10W
CITGO PETROLEUM CORP.	CITGO TRANSPower FLUID, SAE 30
CITGO PETROLEUM CORP.	CITGO TRANSPower, 30
CITGO PETROLEUM CORP.	CITGARD 500 MOTOR OIL SAE 10W-30
CITGO PETROLEUM CORP.	CITGARD 600 MOTOR OIL SAE 15W-40
CITGO PETROLEUM CORP.	CITGARD 600 MOTOR OIL SAE 30
CITGO PETROLEUM CORP.	CITGARD 500 SAE 30
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUI
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUI
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUI
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUI
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUI
COASTAL UNILUBE INC.	COASTAL PREMIUM DEXRON III / MERCON /
COASTAL UNILUBE INC.	COASTAL UNILUBE
COASTAL UNILUBE INC.	COASTAL UNILUBE DEXRON III / MERCON
COASTAL UNILUBE INC.	UNILUBE DEXRON III MERCON ATF
COASTAL UNILUBE INC.	UNILUBE DEXRON III MERCON ATF
COFRAN RECHERCHE SARL	COFRAN SINTOFLUID
COGNIS CORPORATION	EMGARD 2803 SYNTHETIC DEXRON-III/MERI
COMPANHIA BRASILEIRA DE PETROL	ULTRAMO TURBO CT SAE 30
COMPANIA GENERAL DE LUBRICANTE	EXXOLUBE XD-3 30
CONOCO INC.	HYDROCLEAR (TM) POWERDRIVE FLUID SA
CONOCO INC.	POWERDRIVE 44 SAE 10W
CONOCO INC.	HYDROCLEAR (TM) POWERDRIVE FLUID SA
CONOCO INC.	POWERDRIVE 44 SAE 30
CONOCO INC.	FLEET HD MOTOR OIL SAE 10W
CONOCO INC.	FLEET HD MOTOR OIL SAE 15W-40
CONOCO INC.	HD FLEET SUPREME ENGINE OIL SAE 15W-
CONOCO INC.	FLEET HD MOTOR OIL SAE 30
CONOCO INC.	CONOCO HYDROCLEAR DEXRON III/MERCC
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSM
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSM
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSM
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSM
CONOCO INC.	HYDROCLEAR DEXRON III / MERCON ATF
CONOCO INC.	HYDROCLEAR MERCON V / DEXRON III ATF

"Pour on the Productivity"

Ask your nearest Allison distributor or dealer about TranSyndtm Synthetic At

Attention: **Al DeNurra**

Date: 10/3/2004

Company: AC Transit

Number of Pages: 24

Fax Number: 1,510-577-8839

Voice Number:

From: **Roger Littlejohn**

Company: CITGO Petroleum Corp.

Fax Number: 916-408-1802

Voice Number: 916-408-1803

Subject: CITGO Product Information

Comments:

Attached is the CITGO Product Information requested. Originals were sent by Fedex.

Roger Littlejohn
Technical Services Manager
Citgo Petroleum
916-408-1803



Sunday, October 03, 2004

To: Al DeNurra-AC Transit

Reference: CITGO Product Data for AC Transit Bid

You requested additional data on CITGO products bid by Western States Oil Company.

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 Roger Littlejohn
 Technical Services Manager
 CITGO Petroleum



Voith Turbo

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8	Chevron Texaco Global Lubricants	Texaco Havoline ATF MERCON V	G34555	Mineral	36,000
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26	Shell Canada	Donax TG	G34028	Mineral	36,000

C4 Approved Fluids List
Allison Transmission Division
General Motors Corporation
 (2/12/01)
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OIL SUPPLIER	PRODUCT BRAND NAME	GM LICENSE NO.	API	OIL TYPE	GRADE	MARKET PLACE	APPROVAL No.
CHEVRON U.S.A. INC.	CHEVRON RPM DELO MOTOR OIL SAE 15W-40		CE/SG		15W-40	1,2	C4-10660288
CHEVRON U.S.A. INC.	CHEVRON RPM HOMO SAE 15W-40		CF4/SH		15W-40	1	C4-21092285
CHEVRON U.S.A. INC.	CHEVRON DELO 400 PLUS MOTOR OIL SAE 30		CE/SG		30	1,2	C4-12850380
CHEVRON U.S.A. INC.	CHEVRON DELO 400 SAE 30		CF2/SH		30	1	C4-21812485
CHEVRON U.S.A. INC.	CHEVRON DELO 400 SAE 30		CF2/SH		30	1	C4-22232586
CHEVRON U.S.A. INC.	CHEVRON RPM DELO MOTOR OIL SAE 30		CE/SG		30	1,2	C4-10790288
CHEVRON U.S.A. INC.	CHEVRON RPM HOMO SAE 30		CE/SH		30	1	C4-20822184
CHEVRON U.S.A. INC.	CHEVRON AUTOMATIC TRANSMISSION FLUID	F-30158			ATF	1,2	C4-18671894
CHEVRON U.S.A. PRODUCTS CO.	CHEVRON DRIVE TRAIN FLUID HD			C-4 Only	30	1,2	C4-18701894
CHEVRON U.S.A. PRODUCTS CO.	CHEVRON AUTOMATIC TRANSMISSION FLUID	F-30108			ATF	1,2,3,8,11	C4-20062094
CHRYSLER CANADA LTD.	CHRYSLER MOPAR TURBO XD 16W-40 DIESEL ENGINE OIL			C-4 Only	16W-40	1,2	C4-29088688
CHRYSLER CANADA LTD.	MOPAR TURBOXD 15W-40 DIESEL ENGINE OIL		CF4/SH		15W-40	2	C4-21432306
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCON	F-30766			ATF	1,2,8	C4-24963007
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCON	G-34438			ATF	1,2,8	C4-26183686
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCON	F-30227			ATF	2	C4-18821783
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCON	F-30349			ATF	2	C4-18701788
CIA BRASIL DE PETROLEO	ULTRAMO TURBO 30		CF		30	6	C4-29493700
CIA BRASILEIRA PETROLEO IPBRANGA	ISNATIC III	G-S4202			ATF	6	C4-29963800
CITGO PETROLEUM CORP.	CITGO TRANSPOWER FLUID 10W			C-4 Only	10W	1,2	C4-20011884
CITGO PETROLEUM CORP.	CITGO TRANSPOWER FLUID SAE 10W			C-4 Only	10W	1,2,5,8,8	C4-18841182
CITGO PETROLEUM CORP.	CITGO TRANSPOWER FLUID SAE 30			C-4 Only	30	1,2,5,8,8	C4-18831182
CITGO PETROLEUM CORP.	CITGO TRANSPOWER 30			C-4 Only	30	1,4,5,8	C4-18711894
CITGO PETROLEUM CORP.	CITGARD 500 MOTOR OIL SAE 10W-30		CE/SG		10W-30	1,2,4,5,8,8	C4-11020188
CITGO PETROLEUM CORP.	CITGARD 500 MOTOR OIL SAE 15W-40		CE/SG		15W-40	1,2,4,5,8,8	C4-11030189
CITGO PETROLEUM CORP.	CITGARD 500 MOTOR OIL SAE 30		CE/SG		30	1,2,4,5,8,8	C4-11010189
CITGO PETROLEUM CORP.	CITGARD 500 SAE 30		CE/SG		30	1,2,4,5,8,8,11	C4-17111292
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	G-34068			ATF	1	C4-29903800
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	F-30167			ATF	1,2,4,5,8,8	C4-22902806
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	F-30336			ATF	1,2,5,8,8	C4-21172285
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	F-30165			ATF	1,2,8,8	C4-22912806
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	G-34108			ATF	1,2,3,4,5,5,7,8,11	C4-28848988
COASTAL UNILUBE INC.	COASTAL PREMIUM DEXRON III/MERCON ATF	F-30375			ATF	1,4,5,8,8,11	C4-21642306
COASTAL UNILUBE INC.	COASTAL UNILUBE	F-30491			ATF	1,2,3,4,5,8,8,11	C4-22862586
COASTAL UNILUBE INC.	COASTAL UNILUBE DEXRON III/MERCON	F-30491			ATF	1,2,3,4,5,8,8,11	C4-22862586
COASTAL UNILUBE INC.	UNILUBE DEXRON III/MERCON ATF	F-30204			ATF	12	C4-18691783
COASTAL UNILUBE INC.	UNILUBE DEXRON III/MERCON ATF	F-30310			ATF	12	C4-18831894
COFRAN RECHERCHE SARL	COFRAN SINTOFLUID			C-4 Only	ATF	3,4,5,8,7,8	C4-11840288
COGNIS CORPORATION	EMGARD 2803 SYNTHETIC DEXRON-III/MERCON FLUID	G-S4494			ATF	12	C4-28483700
COMPANHIA BRASILEIRA DE PETROL	ULTRAMO TURBO CT SAE 30			C-4 Only	30	8	C4-27683586
COMPANIA GENERAL DE LUBRICANTE	EXXOLUBE XD-3 20		CF2/SH		30	6,8,11	C4-21502986
CONOCO INC.	HYDROCLEAR (TM) POWERDRIVE FLUID SAE 10W			C-4 Only	10W	1,2,4,5,8,7,8,11	C4-28533386
CONOCO INC.	POWERDRIVE 44 SAE 10W			C-4 Only	10W	1,8	C4-17621292
CONOCO INC.	HYDROCLEAR (TM) POWERDRIVE FLUID SAE 30			C-4 Only	30	1,2,4,5,8,7,8,11	C4-28643386
CONOCO INC.	POWERDRIVE 44 SAE 30			C-4 Only	30	1,8	C4-17481282
CONOCO INC.	FLEET HD MOTOR OIL SAE 10W		CF		10W	1,2	C4-23022886
CONOCO INC.	FLEET HD MOTOR OIL SAE 15W-40		CE/SH		15W-40	1,2	C4-22602586
CONOCO INC.	HD FLEET SUPREME ENGINE OIL SAE 15W-40		CF4/SH		15W-40	1,2,8	C4-21082286
CONOCO INC.	FLEET HD MOTOR OIL SAE 30		CF4/SH		30	1,2	C4-22622586
CONOCO INC.	CONOCO HYDROCLEAR DEXRON III/MERCON ATF	F-30728			ATF	1,2,8,11	C4-24852887
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSMISSION FLUID	F-30118			ATF	1	C4-22142488
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSMISSION FLUID	F-30456			ATF	1,2	C4-22662586
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSMISSION FLUID	F-30578			ATF	1,2	C4-22732586
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSMISSION FLUID	F-30168			ATF	1,2,8	C4-18741884
CONOCO INC.	HYDROCLEAR DEXRON III / MERCON ATF	F-30371			ATF	1,2,8	C4-24802987
CONOCO INC.	HYDROCLEAR MERCON V / DEXRON III ATF	G-S4078			ATF	1,2	C4-29048688

"Pour on the Productivity"

Ask your nearest Allison distributor or dealer about TransSyndin Synthetic Automatic Transmission Fluid



CITGO QuatraSyn™ Synthetic Transmission Fluid



What Is It?

- QuatraSyn™ Synthetic Transmission Fluid is engineered with a proprietary combination of synthetic base stocks and additives. This synergistic combination of components is designed to work in harmony with the transmission components while offering the very best in fluid life and performance.



 **QuatraSyn™ Qualities**

- Extended drain and filter change intervals resulting in reduced oil cost.
- Outstanding low temperature performance
- Excellent thermal and oxidation stability
- Contains No Viscosity Modifiers resulting in high shear stability
- Outstanding hydrolytic stability
- Unique formulation offers low traction coefficients which can result in increased fuel economy



 **Applications**

- QuatraSyn™ Synthetic Transmission Fluid is designed for use in:
 - School Buses and Vans
 - Refuse Fleets
 - Commercial Trucks and Vehicles
 - Motor Homes
 - Emergency Vehicles
 - On/Off Highway Vehicles
 - Inter/IntraCity Buses
 - Light Duty Pickup Trucks and Passenger Cars







QuatraSyn™ Synthetic Transmission Fluid

QuatraSyn™ meets the performance requirements of:

- GM Vehicles calling for Dexron III
- Ford Vehicles calling for Mercon
- Ford Vehicles calling for Mercon V
- Allison C-4
- Allison TES 295
- VOITH, DIWA Transmission Service Bulletin #0130






Synthetic Lubricants Warranty

SYNTHETIC LUBRICANTS WARRANTY

CITGO Petroleum Corporation guarantees that its Synthetic Lubricants meet the performance requirements of the equipment for which they are recommended. CITGO Petroleum Corporation further warrants that its Synthetic Lubricants meet the standards and specifications set forth on the product packaging and Product Information Sheets. In the event that the Synthetic Lubricants fail to conform with this warranty, CITGO shall be responsible for the reasonable costs of repairs for all damages to equipment in which it was used, which are directly caused by such failure. It is expressly agreed that CITGO is not responsible for any indirect or consequential damages.

In order to claim under this Warranty you will be required to submit a sample of the Synthetic Lubricant from the failed equipment to CITGO as well as records showing that the equipment has been maintained in a preventative maintenance program which meets the equipment manufacturer's recommendations, and that the Synthetic Lubricant was used in accordance with the operating instructions of the manufacturer of the equipment or vehicle. CITGO reserves the right to examine the failed equipment parts. Call 800-248-4GMW if you have an equipment problem.

Customer Name: _____

City/State: _____


Paul Rudolph
General Manager, Lubricants Marketing





QuatraSyn™ Synthetic Transmission Fluid

QuatraSyn™ ATF QFM 168-985 Fluid		
Viscosity		
cSt @ 100°C	7.3	7.27
cSt @ 40°C	38.31	38.83
Viscosity Index	171	168
Pour Point, °C	<-68	-65
Brookfield cP @ -40°C	8200	8180
CCS, cP @ -30°C	2260	2510
Noack Volatility, % Loss	0.5	11.1
4-Ball Wear, mm at 40KG	0.48	0.5
Oxidation Stability RPVOT, min	1861	1094
Sulfated Ash, %	0.01	0.1
Total Base Number	1.85	1.87
Total Acid Number	1.03	1.29
Shear Stability		
KRL Shear, CEC L-45-20, % Loss	3.04	5.32
HT/HS, Viscosity @ 150°C	2.68	2.57

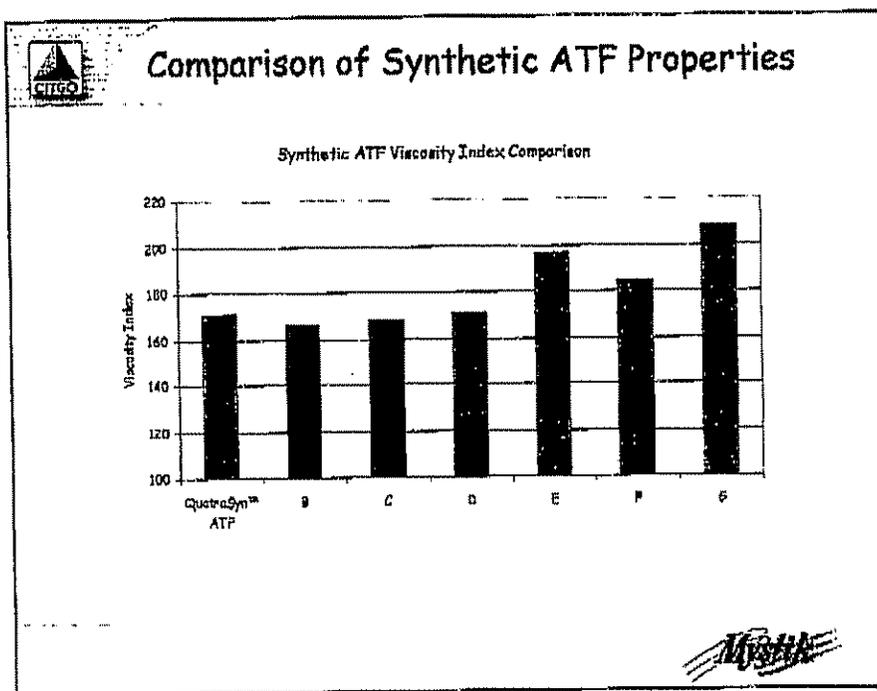
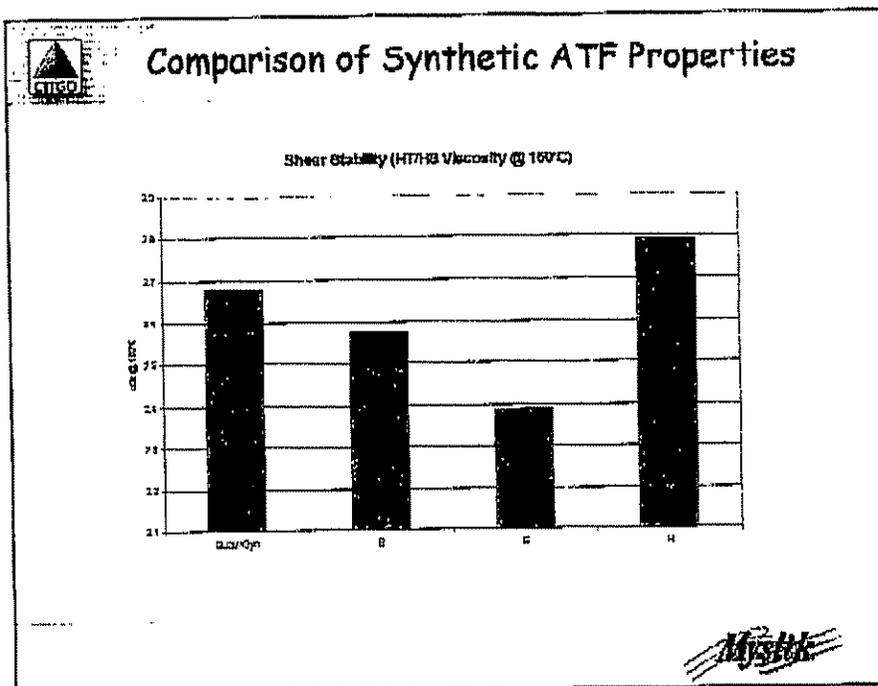
***CEM TES-286 Fluid Purchased at Local Swiss Allison Dealer

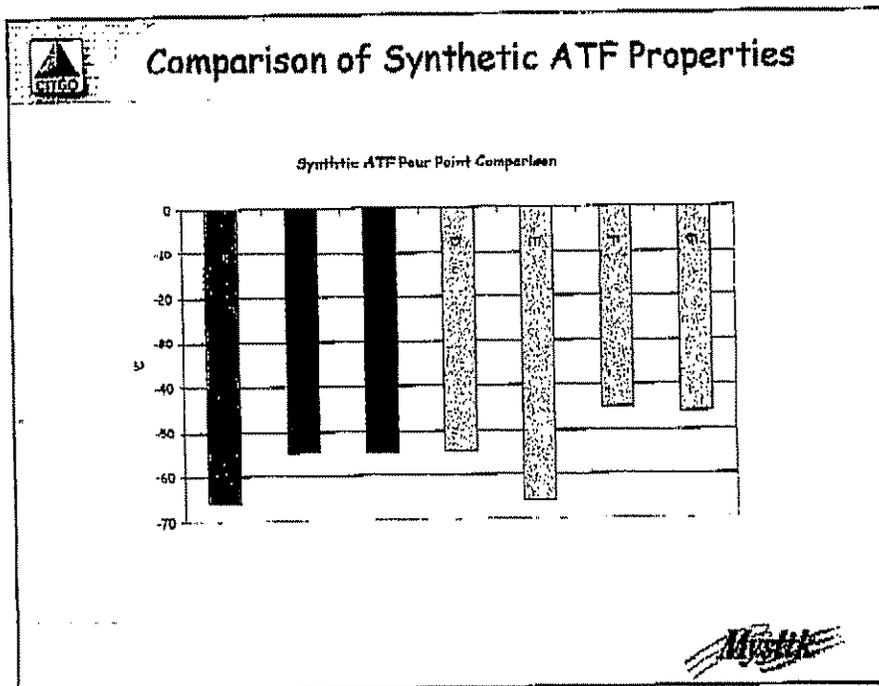
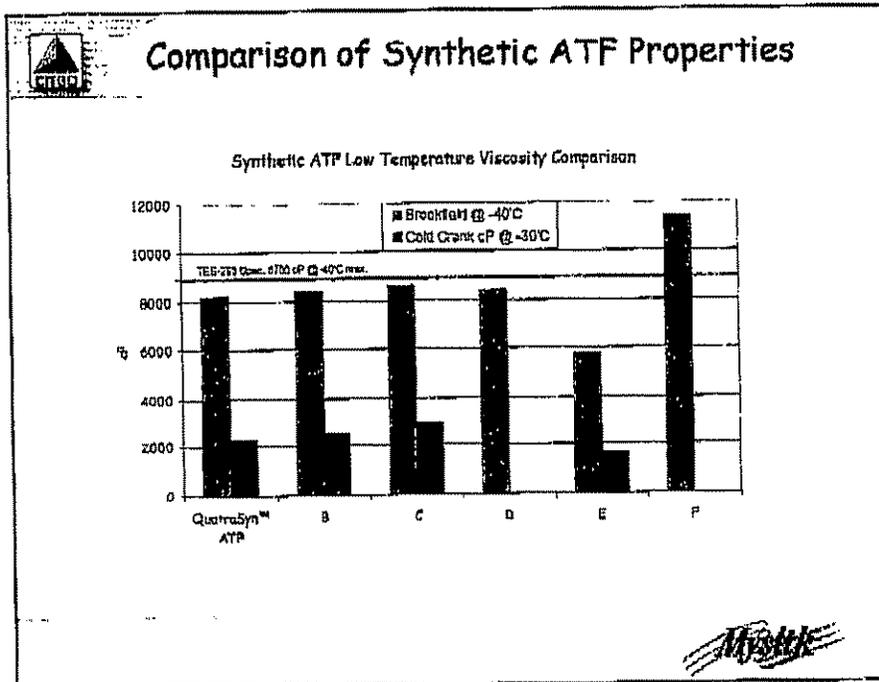


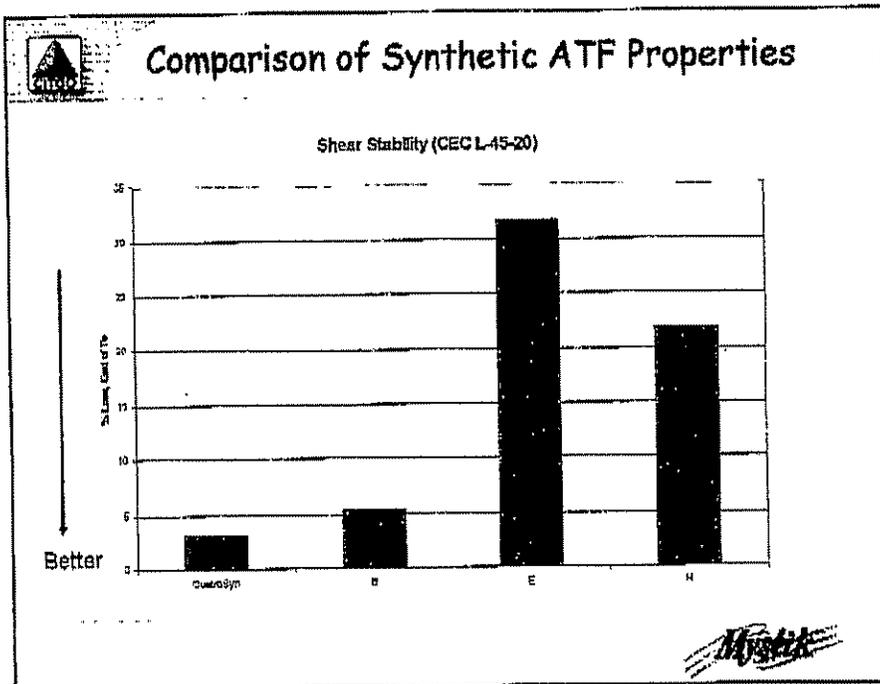
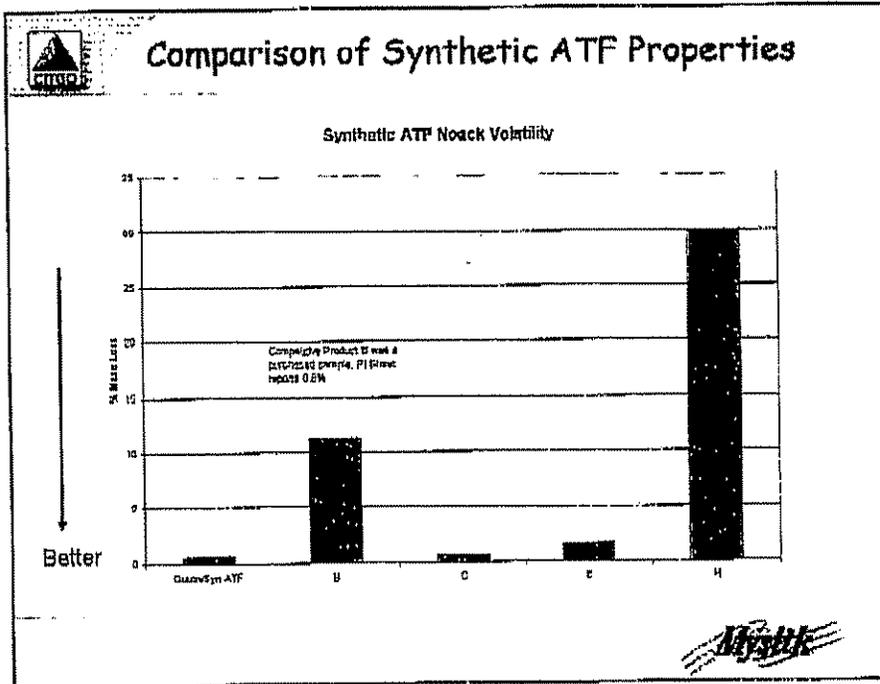

Comparison of ATF Properties

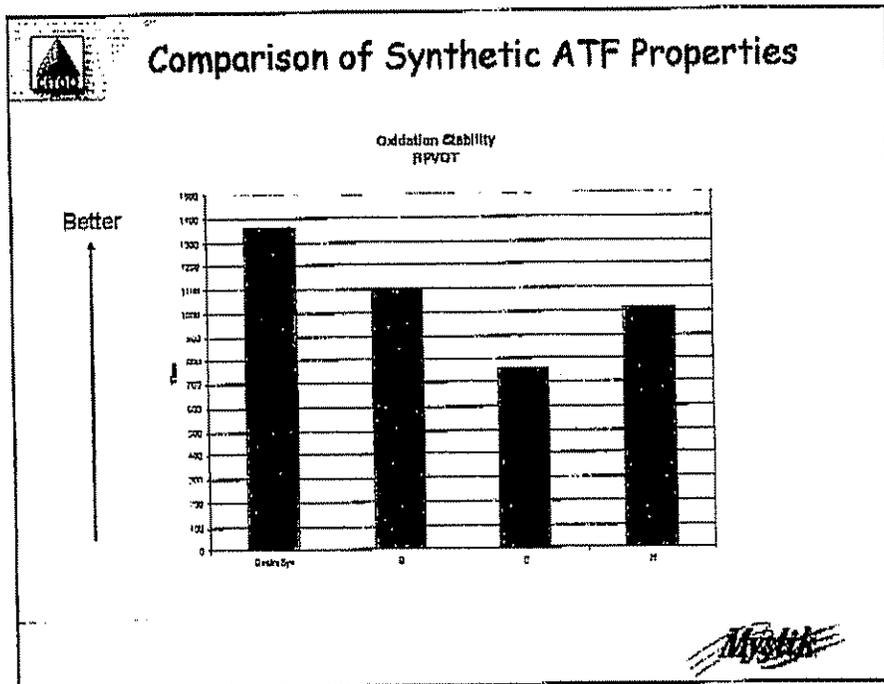
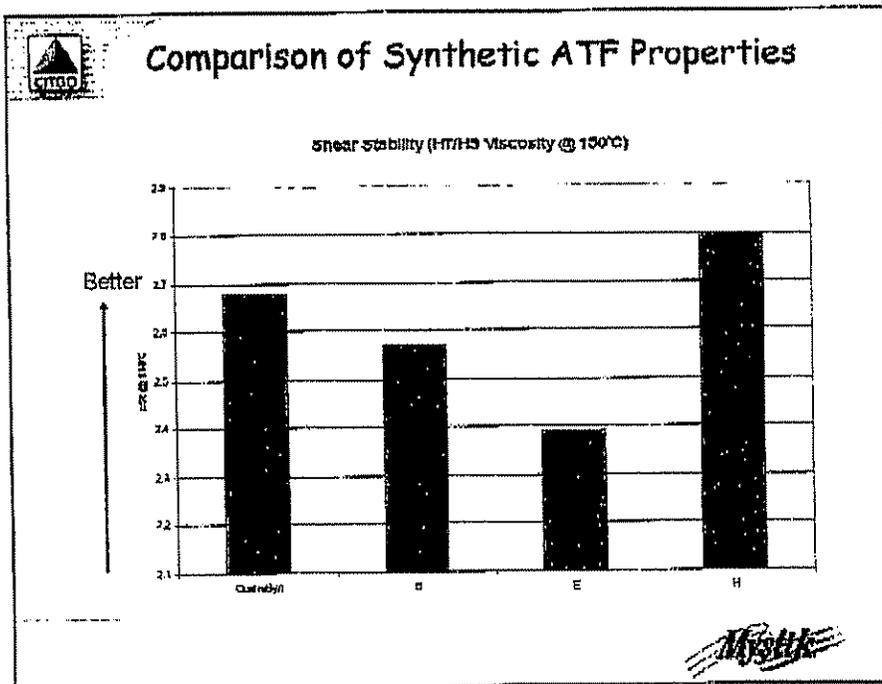
	QuatraSyn	OEM TES-295 Code B	Leading Synthetic ATF Code E	Leading Semi-Syn Mercon V Code H
Viscosity				
cSt @ 100°C	7.25	7.27	7.85	8.03
cSt @ 40°C	36.31	36.83	36.16	35.64
Viscosity Index	161	166	197	209
Pour Point °C	<-66	-65	<-66	-48
Brookfield, cP @ -40°C	8200	8190	8720	9785
CCS, cP @ -30°C	2260	2510	1620	N.D.
Noack Volatility, % Loss	0.5	11.1	1.6	29.7
4-Ball Wear, mm at 40kg	0.48	0.5	0.48	0.61
Oxidation Stability RPVOT, min.	1864	1094	757	1016
Shear Stability				
KRL Shear, CEC L-45-20, % Loss	3.04	5.32	31.77	21.84
HT/HS, Viscosity @ 150°C	2.68	2.57	2.39	2.79











Cummins Inc.
Box 3005
Columbus, Indiana
47202-3005



December 20, 2002

David Clark
CITGO Petroleum Corporation
P.O. Box 3758
Tulsa, Oklahoma 74102

Dear David,

CONFORMANCE TO CES 20074 ENGINE OIL SPECIFICATION

Results from tests according to CES 20074 have been presented to Cummins. In view of the results I would like to give the following comments.

The results have been found to be within the CES 20074 limits and hence oils formulated as stated in your request can be labeled as conformance to CES 20074.

The oils shall be used per the ambient temperature and SAE grade guidelines in the engine specific Operation and Maintenance (O & M) manual, as well as, in any Cummins service documents.

Please notify Cummins Inc. if the formulation of this product changes.

Brand Name: CITGARD NATURAL GAS 15W40
SAE Grade: 15W40

I hope this information will be of assistance to you.

Sincerely,

A handwritten signature in black ink, appearing to read 'Warren A. Totten'.

Warren A. Totten
Fuels and Lubricants

DISCLAIMER: Product registration means the manufacturer or marketer has faithfully collected information pertinent to the requirements of the specification, and with the full intention to conform to the specification. However, it is still the responsibility of the manufacturer or marketer to ensure satisfactory performance of its products in all aspects at all times. Registration for CES 20074 does not waive product liability of the manufacturer or marketer. Cummins does not warrant the performance of non-Cummins products, registered or not.

Phone: 812-377-6000
Facsimile: 812-377-3334

Revision Date: February 25, 2002

DETROIT DIESEL

A DaimlerChrysler Company



Friday, June 20, 2003

Mr. David Clark
CITGO
4500 S. 129th E. Ave.
Tulsa, OK 74134

Dear Mr. Clark:

Subject: Applicability of Citgard Natural Gas SAE 15W-40 Engine Oil In
DDC Series 50G and S60G Engines

Thank you for providing information about the Citgard Natural Gas SAE 15W-40 Engine Oil product for use in natural gas fueled engines. Based upon the information provided, this engine oil has been formulated with OLOA 1255Z. Field testing with this additive technology in DDC engines has shown it to perform similarly to OLOA 1255, therefore oils formulated with OLOA 1255Z at 10.81 % mass treat rate in Group I and II base stocks with a non-dispersant viscosity Index improver are acceptable for use in DDC Series 50G and Series 60G engines.

Thank you for providing the documentation for my review. Please contact me at 313-592-5970 should you have any questions.

Sincerely,

A handwritten signature in cursive script that reads "Mesfin Belay".

Mesfin Belay
Fuels and Lubricants

cc:
T. Bistue
D. Karineami
G. Lysinger
J. Reinhart
J. Zhu

Detroit Diesel Corporation 13400 Outer Drive, West / Detroit, Michigan 48239-4001 / Telephone: 313-592-5000

DaimlerChrysler Powersystems



DETROIT DIESEL
CORPORATION



April 26, 2000

Mr. Richard J. Patrick
Product Specialist
Citgo Petroleum
P.O. Box 3758
Tulsa, OK 74102-3758

Dear Dick

Subject: Citgo Pacemaker 1615 15W-40 for Detroit Diesel Corp. Series 50G engines

In response to your inquiry regarding the engine oil requirements for DDC Series 50G natural gas fueled engines and the possible use of Citgo Pacemaker 1615 15W-40. Since no industry performance category exists for identification of the proper engine oils for these engines DDC has adopted a list of recommended oils based on field experience and their performance in the engine during product development.

To accommodate the needs of transit customers other oils have been identified which use identical additive technology. Therefore oils formulated with OLOA 1255 at a 10.1% mass treatment rate have been accepted as alternates to the recommended products listed in DDC publication 7SE272. I have received written communication that Citgo Pacemaker 1615 15W-40 is formulated with OLOA 1255 at the prescribed treatment rate. Based upon this information, Pacemaker 1615 can be recommended for this service. I have recommended that customers confirm the chemical profile as:

Calcium - 1200 ppm, Phosphorous - 280ppm, Zinc - 303 ppm, and TBN (D2896) - 5.1.

Should this information be inaccurate, please notify me as soon as possible. If you have any further comments or questions, do not hesitate to contact me.

Sincerely,

A handwritten signature in cursive script that reads "Danny E. Larkin".

Danny E. Larkin
Fuels and Lubricants

cc:

World Headquarters - 13400 Outer Drive West / Detroit Michigan 48239-4001 / Telephone 313-592-5000

P R O D U C T I N F O R M A T I O N

CITGO CITGARD® NATURAL GAS 15W40 ENGINE OIL



Date 02/04

- DESCRIPTION:** CITGARD® Natural Gas 15W40 Engine Oil is specially formulated for compressed natural gas (CNG) engines in transit operation. It is available as an SAE 15W-40 viscosity grade. Building on CITGO's long heritage of outstanding gas engine oils for stationary applications, CITGARD® NATURAL GAS 15W40 ENGINE OIL provides the protection needed in today's demanding mobile CNG applications.
- QUALITIES:** CITGARD® Natural Gas 15W40 Engine Oil is formulated with base stocks specially selected for compressed natural gas operation, proven additives and a shear stable VI improver. This unique combination provides protection against deposits in the higher temperature natural gas combustion chamber. Liner and tappet wear protection far exceed original equipment manufacturers requirements. CITGO's combination of components provides excellent cold pumpability, foam protection, exceptional oxidation and nitration control, overall engine cleanliness, and reduced oil consumption.
- APPLICATIONS:** CITGARD® Natural Gas 15W40 Engine Oil exceeds the requirements for Cummins Engine Company CES 20074 and is recommended for Cummins L-10, "B" and "C" series CNG engines. CITGARD® NATURAL GAS 15W40 ENGINE OIL is recommended for applications of Detroit Diesel included in their 79E272 publication, including Series 50G and 60G natural gas engines. Mack Trucks and John Deere also call for this quality of oil in their natural gas fueled engines. CITGARD® NATURAL GAS 15W40 ENGINE OIL is also suitable for use with other gaseous fuels such as liquefied natural gas and LPG. Always consult your owner's manual for correct oil recommendations.

TYPICAL PROPERTIES:

CITGARD® NATURAL GAS 15W40 ENGINE OIL

SAE Grade	15W-40
Material Code	632015001
API Service Category	CD
Gravity, ASTM D 4052, °API	29.5
Pounds Per Gallon	7.3
Flash Point, ASTM D92, °F, (°C)	437, (225)
Viscosity ASTM D445, cSt at 40°C	124
cSt at 100°C	15
Viscosity Index, ASTM D2270	125
Pour Point, ASTM D97, °F, (°C)	-17, (-27)
Sulfated Ash, ASTM D 872, %	0.56
Total Base Number, ASTM D2896	5.3

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C10128

TYPICAL PROPERTIES:

CITGO PACEMAKER® GAS ENGINE OIL 1600 SERIES

	1615	1630	1640	1640LP
Product Name	1615	1630	1640	1640LP
SAE Grade	15W-40	30	40	40
Material Code	632047001	632045001	632046001	632048001
Gravity, ASTM D 4052, °API	29	29	28	28
Pounds Per Gallon	7.35	7.36	7.4	7.4
Flash Point, COC, ASTM D 92, °F (°C)	440 (227)	466 (241)	473 (245)	480 (249)
Fire Point, COC, ASTM D 92, °F (°C)	512 (267)	509 (265)	650 (288)	552 (289)
Viscosity, ASTM D 445, cSt at 40°C	115	92	130	132
cSt at 100°C	19.7	10.9	13.4	13.6
ASTM D 2161, SUS at 100°F	570	500	680	692
SUS at 210°F	74	63	73	74
Viscosity Index, ASTM D 2270	123	97	97	98
Pour Point, ASTM D 97, °F (°C)	-27 (-33)	-16 (-27)	5 (-15)	-16 (-27)
Color, ASTM D 1500	8.0	8.0	8.0	8.0
Carbon Residue, % (base stock)	0.02	0.02	0.02	0.02
Sulfated Ash, ASTM D 874, m%	0.45	0.45	0.45	0.45
Total Base No., ASTM D 2896	5.4	5.4	5.4	5.4
Phosphorous, ppm	280	280	280	280

P R O D U C T I N F O R M A T I O N

CITGO PACEMAKER® GAS ENGINE OIL 1600 SERIES



Date 02/04

DESCRIPTION: CITGO Pacemaker® Gas Engine Oil 1600 Series oils are superior low ash, low phosphorus gas engine oils with a balanced advanced additive package to meet API CD quality performance and non-selective catalytic converter requirements. These new generation oils deliver a superior level of cleanliness — with excellent wear protection with a low ash formula that complies with manufacturers' warranties.

Formulated with the latest generation additives and highest quality base stocks available, CITGO Pacemaker® Gas Engine Oil 1600 Series oils are unsurpassed in performance.

- QUALITIES:**
- Contain special dispersants and detergents to insure a cleaner, longer running engine.
 - Control deposits and minimize wear of pistons, rings, and liners.
 - Retain TBN to neutralize combustion acids from sour gas.
 - Effectively control oxidation and nitration which create sludge that thickens the oil, plugs filters and causes excessive foaming.
 - Minimize valve recession to provide longer head life.

APPLICATIONS: CITGO Pacemaker® Gas Engine Oil 1600 Series oils are low ash oils suitable for a wide range of engines operating on virtually any variation of natural or synthetic gas, gas from digester or landfill sources or fuels containing low levels of sulfur and chlorofluorocarbons (CFC). **Note:** In high CFC/sour gas applications, an oil with a higher base reserve may be required.

These oils are recommended for high and medium speed 4-cycle engines manufactured by Caterpillar, Waukesha, Superior, Cooper-Bessemer, Cummins, Dresser-Rand (Categories I, II and III), as well as low-speed engines manufactured by Cooper-Bessemer and Worthington D4-Cycle.

CITGO Pacemaker® Gas Engine Oil 1640LP is a specialty formulated SAE 40 grade product that exhibits superior low temperature properties, compared with other monograde oils. This low pour product is particularly well suited for applications where improved low temperature fluidity is needed, but a monograde oil is recommended by the engine manufacturer.

**CUSTOMER
BENEFITS:**

- Cleaner pistons
- Minimum oil viscosity increase
- Low wear
- Improved TBN retention
- Catalyst compatible
- Clean crankcases and top decks
- Reduced valve recession

CITGO Petroleum Corporation • 800/248-4684 • Houston, Texas • Made In USA
C10071

TYPICAL PROPERTIES:**CITGO QuatraSyn Synthetic ATF**

Material Code	632493001
Gravity, ASTM D 237, °API	37.1
Specific Gravity, D 4052	0.839
Pounds per Gallon	6.99
Flash Point ASTM D 92, °F (°C)	492 (222)
Viscosity ASTM D 445,	
cSt at 100°C	7.25
cSt at 40°C	36.48
Viscosity Index	171
Brookfield Viscosity ASTM D-2983	
cP at -40°C	8,200
cP at -20°C	1,025
Pour Point ASTM D-97, °F (°C)	<-87 (<-66)
Total Acid Number, ASTM D 864, mg KOH/gm	1.03
4-Ball Wear, ASTM D-2266	0.48
40kg, 1200 rpm, 1 hour,	
Cold Cranking Simulator, ASTM D 5293, cP at -30°C	2260

PRODUCT INFORMATION



CITGO QuatraSyn Transmission Fluid

Date 07/04

DESCRIPTION: CITGO's QuatraSyn Synthetic Transmission Fluid is the next generation in automatic transmission fluids. QuatraSyn is engineered to offer extended service intervals and remain stable under extremely severe operating conditions.

QUALITIES: CITGO's QuatraSyn Synthetic Transmission Fluid is engineered with a proprietary combination of synthetic base stocks and additives. This synergistic combination of components is designed to work in harmony with the transmission components while offering the very best in fluid life and performance. CITGO's QuatraSyn Synthetic Transmission Fluid provides:

- Extended drain and filter change intervals resulting in reduced oil disposal cost.
- Outstanding low temperature performance.
- Excellent thermal and oxidation stability resulting in better transmission performance through a reduction in sludge and deposit formation.
- QuatraSyn contains NO viscosity modifiers, resulting in high shear stability.
- QuatraSyn unique formulation offers low traction coefficients which can result in increased fuel economy.

APPLICATIONS: CITGO's QuatraSyn Synthetic Transmission Fluid is intended for use in the following universal powershift and automatic transmission applications:

- School Buses and Vans
- Refuse Fleets
- Commercial Trucks and Vehicles
- Motorhomes
- Emergency Vehicles
- On/Off-Highway Vehicles
- Inter/Intracity Buses
- Light Duty Pickup Trucks and Passenger Cars

CITGO's QuatraSyn Synthetic Transmission Fluid meets the OEM requirements for most domestic transmissions and is recommended for use in applications which call for the products meeting the following specifications:

Allison T6B 285
Voith Transmissions

Allison C-4
ZF Transmissions

QuatraSyn is recommended for use in all GM and Ford Transmissions except those calling for Ford SP-1, Ford Type F and all CVT Fluids.



Sunday, October 03, 2004

To: Al DeNurra-AC Transit

Reference: CITGO Product Data for AC Transit Bid

You requested additional data on CITGO products bid by Western States Oil Company.

1. TS-1 Automatic Transmission Fluid, Mineral Base:
 - a. GM Lic. # G34059
 - b. Voith approval number-based on GM Lic. #G34059 (See Attached Voith Service Bulletin #0130
 - c. Allison C-4 Approval-C4-29903800
2. TS-3 Replacement-Synthetic Automatic Transmission Fluid
 - a. QuatraSyn-See attached data
 - b. Equivalent to or exceeds Allison TES-295 requirements
3. TS-5 Cummins Heavy Duty Natural Gas/LPG Engine Oil 15W-40 Specifications-See attached approval letters

Specifications	Pacemaker 1615	Citgard Natural Gas Engine Oil 15W-40
Sulfated Ash	.45	.55
TBN	5.4	5.2
TAN	.5	.8
Phosphorus	270	702
Zinc	330	778
Calcium	1300	1200
Copper Corrosion	NA	1A
Lead Increase	NA	<50
Tin Increase	NA	<20

See attached Product Information Sheets on the above CITGO products.


 Roger Littlejohn
 Technical Services Manager
 CITGO Petroleum

QPL-5606-31

CAGE CODE	MANUFACTURER'S DESIGNATION	TEST OR QUALIFICATION REFERENCE	MANUFACTURER'S NAME AND ADDRESS
8Y842	Technolube FB003	MLB 01-04 16 Jul 01	Lubricating Specialties Company Technolube Products Division 8015 Paramount Blvd Pico Rivera, CA 90660-4888 <i>Plant:</i> 3365 E. Slauson Ave. Vernon, CA 90058
F4101	Hydraunycoil FH 51	MLB 01-06 26 Sep 01	Nyco SA 66, Avenue Des Champs-Elysees 51, Rue de Ponthieu 75008 Paris France <i>Plant:</i> Societe Touraisienne de Produits Chimiques Z.I. de Tournai Ouest Rue de l'Ancienne Potence, 22 7503 Tournai Belgium
0HDS4	Petronomics Plus	MLB 02-27 4 Sep 02	<i>Distributed by:</i> Petronomics Mfg. Group, Inc. P.O. Box 644 Hutchison, KS 67504-0644
07950	Royco 756	MLB 02-12 6 Mar 02	Royal Lubricants, Inc. P.O. Box 518 215 Merry Lane East Hanover NJ 07936-3920
3AD00	SENT-5606	MLB 00-10 3 Jan 01	Sentinel Canada Div SLC/LCLS 7300 Rue St-Jacques Montreal, Quebec H4B 1W1 Canada

CAGE CODE	MANUFACTURER'S DESIGNATION	TEST OR QUALIFICATION REFERENCE	MANUFACTURER'S NAME AND ADDRESS
KA832	AeroShell Fluid 41	MLB 02-19 29 May 02	<i>Distributed by:</i> Shell Aviation Ltd. Shell Centre York Road London SE1 7NA United Kingdom

ExxonMobil Lubricants &
Petroleum Specialties
255 27th Avenue
San Francisco, California 94121
(415) 752-2439
john.a.ragunas@exxonmobil.com

John A. Ragunas
Northern California Territory Manager
Commercial Vehicle Lubricants



September 30, 2004

Mr. Al DeNurra, Senior Buyer
Alameda - Contra Costa Transit District
10626 International Boulevard
Oakland, California 94603

SUBJECT: Lubrication Products, Contract Proposal No. 2004-879RTCC

Dear Mr. DeNurra:

Tom Lopes Distributing Co. (dba Western States Oil), a local ExxonMobil lubricants and petroleum specialties distributor, has forwarded to me your request for product information to support their recent bid proposal. The following is provided in response to that request:

TS-2, Synthetic Automatic Transmission Fluid

Mobil 1 Synthetic ATF has undergone industry testing and has obtained the following OEM approvals:

- GM Dexron III: G-34036
- Voith: G34036
- Allison C-4: C4-18921793

TS-4, Heavy Duty Diesel Engine Oils

Exxon XD-3 30 and Exxon XD-3 40 have been tested in accordance with applicable ASTM and SAE procedures, and demonstrate the following properties:

- Alkalinity (ASTM D2896): 7.3
- Zinc: 1410 ppm
- Phosphorus: 1280 ppm

TS-7, Aviation Hydraulic Fluid

Please refer to the attached Qualified Products List (QPL) 5606-31 issued by the Air Force Materiel Command. U.S Military Specification MIL-H-5606G was declared "Inactive for New Design" in March 1996 and has been superseded by U.S. Military Specification MIL-PRF-5606. Mobil Aero HF meets both U.S. Military Specifications, MIL-H-5606G and MIL-PRF-5606 (Reference MLB 02-22).

Sincerely,

John A. Ragunas

QUALIFICATIONS CERTIFIED
September 2002

QPL-5606-31
6 September 2002
SUPERSEDING
QPL-5606-30
29 March 1996

QUALIFIED PRODUCTS LIST
OF
PRODUCTS QUALIFIED UNDER SPECIFICATION
MIL-PRF-5606
HYDRAULIC FLUID, PETROLEUM BASE,
AIRCRAFT, MISSILE, AND ORDNANCE

*Effective 29 March 1996, MIL-H-5606G has been declared "Inactive for New Design."
This QPL is applicable on all acquisitions to which MIL-H-5606 or MIL-PRF-5606 is
applied, other than for use in new designs.*

This list has been prepared for use by or for the Government in the acquisition of products covered by the subject specification. Such listing of a product is not intended to, and does not, connote endorsement of the product by the Department of Defense. All products listed herein have been qualified under the requirements for the product as specified in the latest effective issue of the applicable specification. The list is subject to change without notice; revision or amendment of this list will be issued as necessary. The listing of a product does not release the contractor from compliance with the specification requirements. Products are qualified for five years from the qualification approval date.

THE ACTIVITY RESPONSIBLE FOR THIS QUALIFIED PRODUCTS LIST IS THE AIR FORCE MATERIEL COMMAND, ASC/ENOI, BLDG 560, 2530 LOOP ROAD WEST, WRIGHT-PATTERSON AFB OH 45433-7101. THE ACTIVITY RESPONSIBLE FOR QUALIFICATION APPROVAL IS AFRL/MLBT, BLDG 654, 2941 P STREET, WRIGHT-PATTERSON AFB OH 45432-7750.

AMSC N/A

FSC 9150

DISTRIBUTION STATEMENT A. Approved for public release; distribution is unlimited.

QPL-5606-31

CAGE CODE	MANUFACTURER'S DESIGNATION	TEST OR QUALIFICATION REFERENCE	MANUFACTURER'S NAME AND ADDRESS
0JWS4	Arpolube 5606	MLB 02-27 4 Sept 02	<p><i>Distributed by:</i></p> <p>Arpol Petroleum Company 2275 Tucker Industrial Rd. Tucker, GA 30084</p>
98308	Brayco Micronic 756	MLB 02-15 21 Mar 02	<p>Castrol Industrial North America Endurance Technology 1001 West 31st Street Downers Grove, IL 60515</p> <p><i>Plant:</i></p> <p>5511 District Blvd. Los Angeles, CA 90040</p>
04BH0	<p>Chevron Aviation Hydraulic Fluid G</p> <p>Texaco Aircraft Hydraulic Oil 5606G</p>	<p>MLB 01-08 5 Oct 01</p> <p>MLB 01-08 5 Oct 01</p>	<p><i>Distributed by:</i></p> <p>ChevronTexaco Global Lubricants 6101 Bollinger Canyon Rd., T3066 San Ramon, CA 94583</p>
1PWD8	Invarol FJ 13	MLB 99-02 15 Jun 99	<p>ESSO Saf 2, rue des Martinets 92569 Rueil-Malmaison Cedex, France</p> <p><i>Plant:</i></p> <p>ESSO Raffinage S.A.F. Usines Lubrifiants de Port-Jerome/Gravenchon BP70 Notre-Dame-de-Gravenchon 76330 France</p> <p><i>Distributed by:</i></p> <p>Exxon Mobil Corp. 3225 Gallows Rd. Fairfax, VA 22037</p>
1PWD8	Mobil Aero HF	MLB 02-22 6 Aug 02	<p><i>Distributed by:</i></p> <p>Exxon Mobil Corporation 3225 Gallows Road Fairfax, VA 22037</p>

Al DeNurra

To: john.a.ragunas@exxonmobil.com
Subject: RE: Santa Cruz & Golden Gate Transit

John: My office is working on their behalf. Our Technical Services Dept. will advise if the products meet the IFB's spec. The other agencies will award their own contracts.

FYI
Lloyd Longnecker Santa Cruz Metropolitan Transit 831 426-0199
Yvonne Pierce Golden Gate Transit 415 257-4481

Regards,
Al

-----Original Message-----

From: john.a.ragunas@exxonmobil.com
[mailto:john.a.ragunas@exxonmobil.com]
Sent: Friday, October 01, 2004 11:39 AM
To: adenurra@actransit.org
Subject: Santa Cruz & Golden Gate Transit

Al: Can you provide contacts for these two bids? Is your office working the due diligence on their behalf, or are they handling directly?

Thank you.

John A. Ragunas
CVL Territory Manager, Northern California
ExxonMobil Lubricants & Petroleum Specialties Company

255 27th Avenue
San Francisco, CA 94121
(415) 752-2439 office
(415) 359-3755 cell

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CVL Territory Manager, Northern California
ExxonMobil Lubricants & Petroleum Specialties Company

255 27th Avenue
San Francisco, CA 94121
(415) 752-2439 office
(415) 359-3755 cell

TRANSMISSION VERIFICATION REPORT

TIME : 08/09/2004 03:25
NAME :
FAX :
TEL :
SER.# : BROK2J718039

DATE, TIME	08/09 03:25
FAX NO./NAME	916505933672
DURATION	00:00:21
PAGE(S)	01
RESULT	OK
MODE	STANDARD ECM

Aug-09-04 10:17A BERNARD HODES GROUP

65059332122

P.01



TO: AID.
Fr: Leslie L ad for approval.

Prepared For: Al Denurra
AC Transit
FAX: 510 577-8839

From: Leslie Lafond
Email: llafond@pa.hodes.com
Phone: 650-264-1130
FAX: 650-593-3672

Invitation for Bids (IFB) 2004-879RTCC Alameda-Contra Costa Transit District

Media: Oakland Tribune
Run Date(s): 8/17/2004
Estimate: \$729.84
Ad type/IO: Incolumn/46582
Key: Legal

Alameda-Contra Costa Transit District of California, on behalf of the Regional Transit Coordinating Council Procurement Committee (RTCC), is requesting fixed bids for the purchase of Lubrication Products. IFB 2004-879RTCC will be available on or after August 17th, 2004 at this web address:

Please reply with changes/final approval
by 3 pm.

<http://www.actransit.org/purchasing/acpronet/index.wu4?action=viewprocs>.

Select the procurement you are interested in. You must have Adobe Acrobat Reader to view the file. If an



TO: Al D.
Fr: Leslie L ad for approval

Prepared For: Al Denurra
AC Transit
FAX: 510 577-8839

From: Leslie Lafond
Email: llafond@pa.hodes.com
Phone: 650-264-1130
FAX: 650-593-3672

Invitation for Bids (IFB) 2004-879RTCC Alameda-Contra Costa Transit District

Media: Oakland Tribune
Run Date(s): 8/17/2004
Estimate: \$729.84
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Please reply with changes/final approval by 3 pm.
12

<http://www.actransit.org/purchasing/acpronet/index.wu4?action=viewprocs>

Select the procurement you are interested in. You must have Adobe Acrobat Reader to view the file. If an addendum has been issued, you must be a registered ASC Pronet User to download it. If you are not a registered user, request an Online Purchasing Vendor Account. A fixed price bid must be received on or before 2:00pm on Septemeber 28, 2004, by Al DeNurra, Senior Buyer, AC Transit, 10626 International Blvd., Oakland, CA 94603. Phone: 510-577-8809.

TO: Leslie

OK

Thanks
AL D.

510 577-8809

Al DeNurra

From: webmaster@actransit.org
Sent: Monday, August 09, 2004 4:52 PM
To: adenurra@actransit.org
Subject: Procurement Vendor Contact Info

adenurra@actransit.org
Message-Id: <20040809155115.SM01280@mizar2>

Information regarding your procurement, "Lubrication Products Invitation for Bid" was sent to the following vendors:

Amtecol, Inc.
Peter Nguyen, Sales Manager
5102081888, 5106270001, petern@amtecol.com

BC stocking Distributing
Chris Jones, General Manager
8008085823, 7074552921, chris@bcstocking.com

bcstocking
Brett Leggitt, General Manager
5102154191, 5102154194, leggittb@scoil.com

First Automotive Dist.
George Macchia, Vice President
6502449400, 6502449370, jmsmgm@aol.com

Melrose Ford, Inc.
Dan Durigan, Fleet Manager
5105348520, 5105339490, fairwind@pacbell.net

Morris Material Handling
Ron Heemskerk, Service Inspection Sales
5103524720, 5103523424, rheemskerk@morriscranes.com

San Francisco Petroleum
Linda Meza, Territory Manager
4156215226, 4155523836, lindasfp@yahoo.com

vehicle maintenance program, inc
Penny Brooks, President
5613626080, 5613627994, sales@vmpparts.com

World Wide Petroleum, Inc.
Fred H. Jackson, President
7143684630, 7143684637, fredJ@gowwp.com

Al DeNurra

To: Bill Livingston; Carol Babington
Cc: Anne Fudge; Joan Strahan
Subject: IFB 2004-879RTCC

August 3, 2004

Hi Bill, Carol, Ann,

I mailed you IFB 2004-879RTCC, Lubrication Products, this afternoon. If possible, please expedite your review as the target date for mailing this bid is Monday, 8-10-04.

Regards,

Al DeNurra x8809

Hi Carol, Ann

Please let me know when this IFB is sent to the GM's office.

Thank you,

Al

Al DeNurra

To: Joan Strahan
Subject: FW: Invitation for Bid 2004-879RTCC

Joan,

Stewart intended to cc: you and not J Martin.

Stewart spoke with Lee Curry, Western States Oil about Technical Specs and I spoke with Everette Yee about sending those specs within a couple days.

Regards,

Al

-----Original Message-----

From: Stuart Hoffman
Sent: Wednesday, September 29, 2004 3:09 PM
To: Al DeNurra; Joan Martin
Cc: Bob Bithell
Subject: Invitation for Bid 2004-879RTCC

Al,

Per our discussion I have reviewed the apparent low bidder and found the following items omitted from the vender Western Sates Oil Company:

TS-1

There was no proof of authenticity documents provided by the vender providing approval numbers from Voith and Allison.

TS-2

There was no proof of authenticity documents provided by the vender providing approval numbers from Voith and Allison.

TS-3

There was no proof of authenticity documents provided by the vender providing approval numbers from Voith and Allison.

TS-4

Did not provide all specification information requested. Please review TS-4 for all specifications requested

TS-5

Did not provide all specification information requested. Please review TS-5 for all specifications requested

TS-6

Citco 1615 OK

TS-7

Chevron Aviation Hydraulic Fluid type A I will investigate for acceptance. The H-5606G specification was supplied by EXXON as an alternate.

TS-8

Exxon Nuto H46 id OK if provided.

TS-9

OK

TS-10

OK

TS-11

OK

TS-12

OK

Al DeNurra

From: Mohammed Iqbal [mohammed@surah.com]
Sent: Tuesday, October 05, 2004 10:02 AM
To: ADeNurra@actransit.org

al;
good morning;
here are the pricing;
1: 077-02983 (ms access 2003 lic , access 2003 win 32) qty 10
Description ACCESS 2003 ENG BUS-6.0 WIN
M/S P/N 077-02884
Unit Price \$194.79
2: E85-00345 (win xp pro upgrade lic) qty 10
Description UPG WINDOWS XP PROFESSIONAL BUS-6.0
M/S P/N E85-00425
Unit Price \$172.00

if you are going for bid, pls let me know, i will try and improve the pricing
thanks and regards
mohammed

convenience. Service must be marked on airbill.

FedEx Service:

FedEx. PRIORITY OVERNIGHT TUE

enp: 116460 040CT04

TRK# 8458 5466 2107 FORH 0200

Deliver By: 05OCT04 A1

94603 -CA-US

OAK WA OAKA



FedEx. USA Airbill Express

FedEx Tracking Number 845854662107

1 From
 Date 10-3-04
 Sender's Name Roger Littlejohn Phone 916 405 1803
 Company Citgo Petroleum
 Address 3227 Green Springs Way
 City Roseville State CA ZIP 95747

2 Your Internal Billing Reference

3 To
 Recipient's Name AL De Nuvra Phone 510 577-5809
 Company AC TRANSIT
 Address 10626 INTERNATIONAL BLVD
 City OAKLAND State CA ZIP 94603

To "HOLD" at FedEx location, print FedEx address.
 Address We cannot deliver to P.O. boxes or P.O. ZIP codes.
 City OAKLAND State CA ZIP 94603



8458 5466 2107

0200

4a Express Package Service

FedEx Priority Overnight Next business morning
 FedEx Standard Overnight Next business afternoon
 FedEx First Overnight Earliest next business morning delivery to select locations
 FedEx 2Day Second business day
 FedEx Express Saver Third business day
 Packages up to 150 lbs. Delivery commitment may be later in some areas.

4b Express Freight Service

FedEx 1Day Freight* Next business day
 FedEx 2Day Freight Second business day
 FedEx 3Day Freight Third business day
 Packages over 150 lbs. Delivery commitment may be later in some areas.

5 Packaging

FedEx Envelope*
 FedEx Pak* Includes FedEx Small Pak, FedEx Large Pak, and FedEx Sturdy Pak
 Other
 *Declared value limit \$500

6 Special Handling

SATURDAY Delivery Available ONLY for FedEx Priority Overnight, FedEx 2Day, FedEx 1Day Freight, and FedEx 2Day Freight to select ZIP codes.
 HOLD Weekday at FedEx Location Not available for FedEx First Overnight
 HOLD Saturday at FedEx Location Available only for FedEx Priority Overnight and FedEx 2Day to select locations
 Does this shipment contain dangerous goods? One box must be checked.
 No
 Yes As per attached Shipper's Declaration
 Yes Shipper's Declaration not required
 Dry Ice Dry Ice, 9, UN 1845
 Dangerous Goods (including Dry Ice) cannot be shipped in FedEx packaging.
 Cargo Aircraft Only

7 Payment Bill to:

Enter FedEx Acct. No. or Credit Card No. below.
 Obtain Recip. Acct. No.
 Sender Acct. No. by Section 1 will be billed.
 Recipient
 Third Party
 Credit Card
 Cash/Check.

Total Packages 1
 Total Weight 1.00
 Total Declared Value* \$ 0.00
 Total Charges
 Credit Card Auth.

8 Release Signature

By signing you authorize us to deliver this shipment without obtaining a signature and agree to indemnify and hold us harmless from any resulting claims.
 Questions? Visit our Web site at fedex.com or call 1.800.Go.FedEx® 800.463.3333.
 Rec. Date 10/01/04

446



Sunday, October 03, 2004

To: Al DeNurra-AC Transit

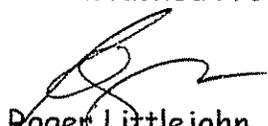
Reference: CITGO Product Data for AC Transit Bid

You requested additional data on CITGO products bid by Western States Oil Company.

1. TS-1 Automatic Transmission Fluid, Mineral Base:
 - a. GM Lic. # G34059
 - b. Voith approval number-based on GM Lic. #G34059 (See Attached Voith Service Bulletin #0130)
 - c. Allison C-4 Approval-C4-29903800
2. TS-3 Replacement-Synthetic Automatic Transmission Fluid
 - a. QuatraSyn-See attached data
 - b. Equivalent to or exceeds Allison TES-295 requirements
3. TS-5 Cummins Heavy Duty Natural Gas/LPG Engine Oil 15W-40 Specifications-See attached approval letters

Specifications	Pacemaker 1615	Citgard Natural Gas Engine Oil 15W-40
Sulfated Ash	.45	.55
TBN	5.4	5.2
TAN	.5	.8
Phosphorus	270	702
Zinc	330	778
Calcium	1300	1200
Copper Corrosion	NA	1A
Lead Increase	NA	<50
Tin Increase	NA	<20

See attached Product Information Sheets on the above CITGO products.


Roger Littlejohn
Technical Services Manager
CITGO Petroleum

DIWA Service Bulletin

Service Bulletin #0130
Replaces Service Bulletin #013N

Issued Date: July 06, 2004
Revised Date: July 06, 2004

For Voith model transmissions: DIWA D851.2&.3 & .3E; D854.2&.3; D854G; D863.2&.2W7; &.3; D864.3 &.3E; D864G and D884.3E

Note: The information contained on this list is certified to be current as of the date listed in the issued document field and is accurate only to the limits of the information supplied by the oil manufacturers and on file with Voith Turbo in York PA as the revised document date. This list may be changed or modified at any time without notice if the technical information regarding the oils and supplied to Voith by the oil manufacturers is updated or modified by the oil manufacturers.

	<i>COMPANY NAME (Marketer)</i>	<i>BRAND NAME</i>	<i>Approval Number</i>	<i>Class Base</i>	<i>Drain Interval*</i>
1	76 Lubricants	76 Mercon V ATF	H36011	Mineral	36,000
2	Amsoil Inc.	Amsoil ATF	E25112	Synthetic	72,000
3	BP Oil and Exploration	Autran Dexron III®/ Mercon	F30135	Mineral	36,000
4	Castrol Ltd. Heavy Duty Lube	TranSynd ATF	G34010	Synthetic	72,000
5	Chevron Texaco Global Lubricants	Chevron Synthetic ATF Heavy Duty	G34090	Synthetic	36,000
6	Chevron Texaco Global Lubricants	Texaco Synthetic ATF Heavy Duty	G34090	Synthetic	36,000
7	Chevron Texaco Global Lubricants	Chevron ATF MERCON V	G 34555	Mineral	36,000
8	Chevron Texaco Global Lubricants	Texaco Havoline ATF MERCON V	G34555	Mineral	36,000
9	Cltgo Petroleum Corporation	Transgard Dexron® III/ Mercon	G34059	Mineral	36,000
10	Coastal Unilube Inc.	Coastal Dexron III/ Mercon	F30310	Mineral	36,000
11	Cofram Lubricants	Sintofluid	ISO 46-GL4	Semi-Synthetic	36,000
12	Cognis Corp	Emgard 2803 Synthetic ATF	G34494	Synthetic	36,000
13	Conoco Phillips	Mercon V ATF	H36011	Mineral	36,000
14	Delta Petroleum Co.	Mercon V2000	G 34095	Mineral	36,000
15	Exxon Mobil Corp Fairfax Va.	Aamco Synthetic Blend ATF	G34015	Mineral	36,000
16	Exxon Mobil Corp Fairfax Va.	Superflow Synthetic ATF	G34015	Mineral	36,000
17	Exxon Mobil Corp Fairfax Va.	Mobile ATF 220	D21611	Mineral	36,000
18	Exxon Mobil Corp Fairfax Va.	Mobil 1 Synthetic ATF	G34036	Synthetic	36,000
19	Fuchs Lubricants Co	Sintofluid III MTA	H36310	Synthetic	72,000
20	Fuchs Lubricants Co	Titan ATF 3000	D22173	Mineral	36,000
21	Fuchs Lubricants Co	Titan ATF 4000	F30105	Mineral	36,000
22	Fuchs Lubricants Co	Titan ATF 5000	E25112	Synthetic	72,000
23	Kendall	Mercon V ATF	H36011	Mineral	36,000
24	Petro Canada Lubricants	Petro Canada ATF	H36007	Synthetic	72,000
25	Phillips 66	Mercon V ATF	H36011	Mineral	36,000
26	Shell Canada	Donax TG	G34026	Mineral	36,000

C4 Approved Fluids List
Allison Transmission Division
General Motors Corporation
(2/12/01)
All Rights Reserved

OIL SUPPLIER	PRODUCT BRAND NAME	GM LICENSE No.	API	OIL TYPE	GRADE	MARKET PLACE	APPROVAL No.
CHEVRON U.S.A. INC.	CHEVRON RPM DELO MOTOR OIL SAE 15W-40		CE/SG		15W-40	1,2	C4-10800289
CHEVRON U.S.A. INC.	CHEVRON RPM HDMO SAE 15W-40		CF4/SH		15W-40	1	C4-21092295
CHEVRON U.S.A. INC.	CHEVRON DELO 400 PLUS MOTOR OIL SAE 30		CE/SG		30	1,2	C4-12850390
CHEVRON U.S.A. INC.	CHEVRON DELO 400 SAE 30		CF2/SH		30	1	C4-21912495
CHEVRON U.S.A. INC.	CHEVRON DELO 400 SAE 30		CF2/SH		30	1	C4-22232596
CHEVRON U.S.A. INC.	CHEVRON RPM DELO MOTOR OIL SAE 30		CE/SG		30	1,2	C4-10790289
CHEVRON U.S.A. INC.	CHEVRON RPM HDMO SAE 30		CE/SH		30	1	C4-20922194
CHEVRON U.S.A. INC.	CHEVRON AUTOMATIC TRANSMISSION FLUID	F-30159			ATF	1,2	C4-19571894
CHEVRON U.S.A. PRODUCTS CO.	CHEVRON DRIVE TRAIN FLUID HD			C-4 Only	30	1,2	C4-19701894
CHEVRON U.S.A. PRODUCTS CO.	CHEVRON AUTOMATIC TRANSMISSION FLUID	F-30108			ATF	1,2,6,8,11	C4-26052094
CHRYSLER CANADA LTD.	CHRYSLER MOPAR TURBO XD 15W-40 DIESEL ENGINE OIL			C-4 Only	15W-40	1,2	C4-29083699
CHRYSLER CANADA LTD.	MOPAR TURBO XD 15W-40 DIESEL ENGINE OIL		CF4/SH		15W-40	2	C4-21432295
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCON	F-30766			ATF	1,2,8	C4-24963097
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCON	G-34438			ATF	1,2,8	C4-29183699
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCON	F-30227			ATF	2	C4-18621793
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCON	F-30249			ATF	2	C4-18701793
CIA BRASIL DE PETROLEO	ULTRAMO TURBO 30		CF		30	6	C4-29403700
CIA BRASIL DE PETROLEO	ISAMATIC III	G-34202			ATF	6	C4-29953800
CITGO PETROLEUM CORP.	CITGO TRANSPower FLUID, 10W			C-4 Only	10W	1,2	C4-20011994
CITGO PETROLEUM CORP.	CITGO TRANSPower FLUID, SAE 10W			C-4 Only	10W	1,2,5,6,8	C4-16641192
CITGO PETROLEUM CORP.	CITGO TRANSPower FLUID, SAE 30			C-4 Only	30	1,2,5,6,8	C4-16631192
CITGO PETROLEUM CORP.	CITGO TRANSPower, 30			C-4 Only	30	1,4,5,6	C4-19711894
CITGO PETROLEUM CORP.	CITGARD 500 MOTOR OIL SAE 10W-30		CE/SG		10W-30	1,2,4,5,6,8	C4-11020189
CITGO PETROLEUM CORP.	CITGARD 500 MOTOR OIL SAE 15W-40		CE/SG		15W-40	1,2,4,5,6,8	C4-11030189
CITGO PETROLEUM CORP.	CITGARD 500 MOTOR OIL SAE 30		CE/SG		30	1,2,4,5,6,8	C4-11010189
CITGO PETROLEUM CORP.	CITGARD 500 SAE 30		CE/SG		30	1,2,4,5,6,8,11	C4-17111292
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	G-34059			ATF	1	C4-29903800
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	F-30167			ATF	1,2,4,5,6,8	C4-22902696
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	F-30338			ATF	1,2,5,6,8	C4-21172295
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	F-30165			ATF	1,2,6,8	C4-22912696
COASTAL UNILUBE INC.	COASTAL PREMIUM DEXRON III / MERCON ATF	G-34196			ATF	1,2,3,4,5,6,7,8,11	C4-28643699
COASTAL UNILUBE INC.	COASTAL UNILUBE	F-30376			ATF	1,4,5,6,8,11	C4-21542395
COASTAL UNILUBE INC.	COASTAL UNILUBE DEXRON III / MERCON	F-30491			ATF	1,2,3,4,5,6,8,11	C4-22682696
COASTAL UNILUBE INC.	UNILUBE DEXRON III MERCON ATF	F-30204			ATF	12	C4-18881793
COASTAL UNILUBE INC.	UNILUBE DEXRON III MERCON ATF	F-30310			ATF	12	C4-19931994
COFRAN RECHERCHE SARL	COFRAN SINTOFLUID			C-4 Only	ATF	3,4,5,6,7,8	C4-11840289
COGNIS CORPORATION	EMGARD 2803 SYNTHETIC DEXRON-III/MERCON FLUID	G-34494			ATF	12	C4-29463700
COMPANHIA BRASILEIRA DE PETROL	ULTRAMO TURBO CT SAE 30			C-4 Only	30	6	C4-27583599
COMPANIA GENERAL DE LUBRICANTE	EXXOLUBE XD-3 30		CF2/SH		30	6,8,11	C4-21902495
CONOCO INC.	HYDROCLEAR (TM) POWERDRIVE FLUID SAE 10W			C-4 Only	10W	1,2,4,5,6,7,8,11	C4-26533398
CONOCO INC.	POWERDRIVE 44 SAE 10W			C-4 Only	10W	1,8	C4-17521292
CONOCO INC.	HYDROCLEAR (TM) POWERDRIVE FLUID SAE 30			C-4 Only	30	1,2,4,5,6,7,8,11	C4-26543398
CONOCO INC.	POWERDRIVE 44 SAE 30			C-4 Only	30	1,8	C4-17481292
CONOCO INC.	FLEET HD MOTOR OIL SAE 10W		CF		10W	1,2	C4-23022696
CONOCO INC.	FLEET HD MOTOR OIL SAE 15W-40		CE/SH		15W-40	1,2	C4-22602596
CONOCO INC.	HD FLEET SUPREME ENGINE OIL SAE 15W-40		CF4/SH		15W-40	1,2,8	C4-21082295
CONOCO INC.	FLEET HD MOTOR OIL SAE 30		CF4/SH		30	1,2	C4-22622596
CONOCO INC.	CONOCO HYDROCLEAR DEXRON III/MERCON ATF	F-30729			ATF	1,2,6,8,11	C4-24852997
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSMISSION FLUID	F-30118			ATF	1	C4-22142495
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSMISSION FLUID	F-30456			ATF	1,2	C4-22652596
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSMISSION FLUID	F-30576			ATF	1,2	C4-22732596
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSMISSION FLUID	F-30158			ATF	1,2,8	C4-19741894
CONOCO INC.	HYDROCLEAR DEXRON III / MERCON ATF	F-30371			ATF	1,2,8	C4-24902997
CONOCO INC.	HYDROCLEAR MERCON V / DEXRON III ATF	G-34076			ATF	1,2	C4-29043699

"Pour on the Productivity"

Ask your nearest Allison distributor or dealer about **TranSyndm Synthetic Automatic Transmission Fluid**



CITGO QuatraSyn™ Synthetic Transmission Fluid



What Is It?

- QuatraSyn™ Synthetic Transmission Fluid is engineered with a proprietary combination of synthetic base stocks and additives. This synergistic combination of components is designed to work in harmony with the transmission components while offering the very best in fluid life and performance.





QuatraSyn™ Qualities

- Extended drain and filter change intervals resulting in reduced oil cost.
- Outstanding low temperature performance
- Excellent thermal and oxidation stability
- Contains No Viscosity Modifiers resulting in high shear stability
- Outstanding hydrolytic stability
- Unique formulation offers low traction coefficients which can result in increased fuel economy

Mystik



Applications

- QuatraSyn™ Synthetic Transmission Fluid is designed for use in:
 - School Buses and Vans
 - Refuse Fleets
 - Commercial Trucks and Vehicles
 - Motor Homes
 - Emergency Vehicles
 - On/Off Highway Vehicles
 - Inter/IntraCity Buses
 - Light Duty Pickup Trucks and Passenger Cars

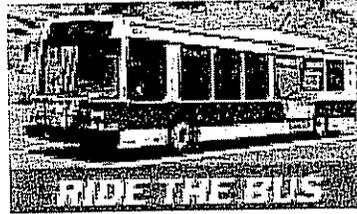


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QuatraSyn™ Synthetic Transmission Fluid

- QuatraSyn™ meets the performance requirements of:
 - GM Vehicles calling for Dexron III
 - Ford Vehicles calling for Mercon
 - Ford Vehicles calling for Mercon V
 - Allison C-4
 - Allison TES 295
 - VOITH, DIWA Transmission Service Bulletin #0130



Mystik



Synthetic Lubricants Warranty

SYNTHETIC LUBRICANTS WARRANTY

CITGO Petroleum Corporation guarantees that its Synthetic Lubricants meet the performance requirements of the equipment for which they are recommended. CITGO Petroleum Corporation further warrants that its Synthetic Lubricants meet the standards and specifications set forth on the product packaging and Product Information Sheets. In the event that the Synthetic Lubricants fail to conform with this Warranty, CITGO shall be responsible for the reasonable costs of repairs for all damages to equipment in which it was used, which are directly caused by such failure. It is expressly agreed that CITGO is not responsible for any indirect or consequential damages.

To make a claim under this Warranty, you will be required to submit a sample of the Synthetic Lubricant from the failed equipment to CITGO as well as records showing that the equipment has been maintained in a preventative maintenance program which meets the equipment manufacturer's recommendations, and that the Synthetic Lubricant was used in accordance with the operating instructions of the manufacturer of the equipment or vehicle. CITGO reserves the right to examine the failed equipment parts. Call 800-248-4684 if you have an equipment problem.

Customer Name: _____

City, State: _____



Paul Rudolph
General Manager, Lubricants Marketing

Date

CITGO Marketer Name

Mystik



QuatraSyn™ Synthetic Transmission Fluid

QuatraSyn™ ATF/OEM TES-295 Fluid		
Viscosity		
cSt @ 100°C	7.3	7.27
cSt @ 40°C	36.31	36.83
Viscosity Index	171	166
Pour Point, °C	<-66	-65
Brookfield cP @ -40°C	8200	8190
CCS, cP @ -30°C	2260	2510
Noack Volatility, % Loss	0.5	11.1
4-Ball Wear, mm at 40KG	0.48	0.5
Oxidation Stability		
RPVOT, min	1361	1094
Sulfated Ash, %	0.01	0.1
Total Base Number	1.85	1.87
Total Acid Number	1.03	1.29
Shear Stability		
KRL Shear, CEC L-45-20, % Loss	3.04	5.32
HT/HS, Viscosity @ 150°C	2.68	2.57

OEM TES-295 Fluid Purchased at Local Tulsa Allison Dealer



Comparison of ATF Properties

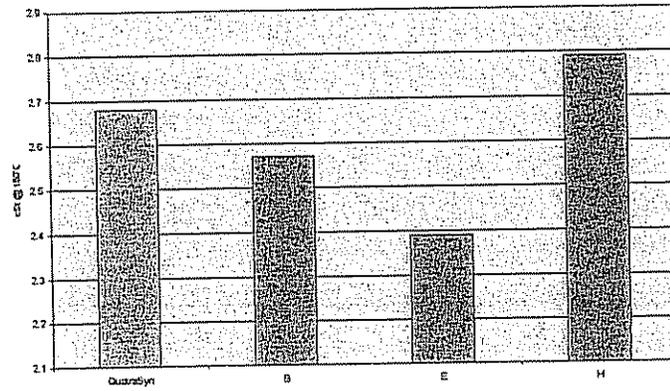
	QuatraSyn	OEM TES-295 Code B	Leading Synthetic ATF Code E	Leading Semi-Syn Mercon V Code H
Viscosity				
cSt @ 100°C	7.25	7.27	7.85	8.03
cSt @ 40°C	36.31	36.83	36.16	35.64
Viscosity Index	161	166	197	209
Pour Point °C	<-66	-65	<-66	-48
Brookfield, cP @ -40°C	8200	8190	5720	9785
CCS, cP @ -30°C	2260	2510	1620	ND
Noack Volatility, % Loss	0.5	11.1	1.6	29.7
4-Ball Wear, mm at 40kg	0.48	0.5	0.48	0.61
Oxidation Stability				
RPVOT, min.	1364	1094	757	1016
Shear Stability				
KRL Shear, CEC L-45-20, % Loss	3.04	5.32	31.77	21.84
HT/HS, Viscosity @ 150°C	2.68	2.57	2.39	2.79





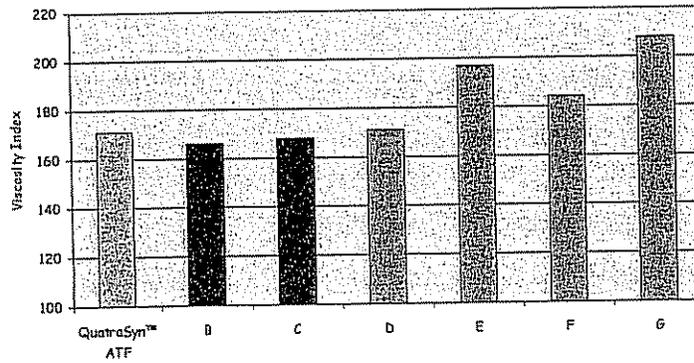
Comparison of Synthetic ATF Properties

Shear Stability (HT/HS Viscosity @ 150°C)



Comparison of Synthetic ATF Properties

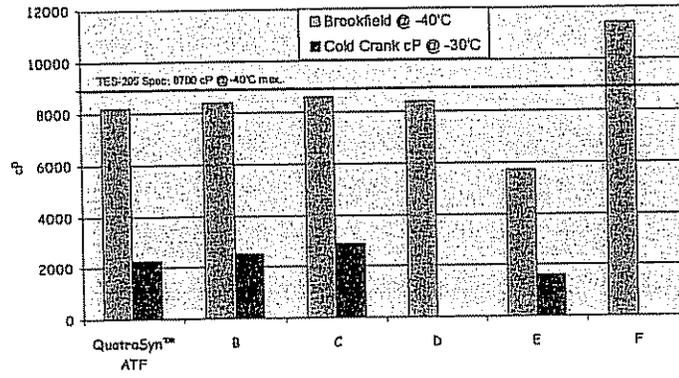
Synthetic ATF Viscosity Index Comparison





Comparison of Synthetic ATF Properties

Synthetic ATF Low Temperature Viscosity Comparison

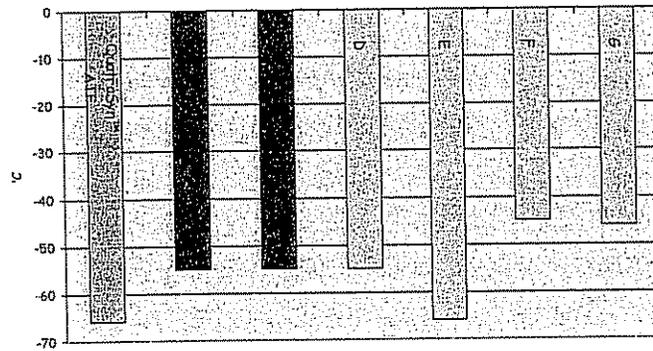


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Comparison of Synthetic ATF Properties

Synthetic ATF Pour Point Comparison

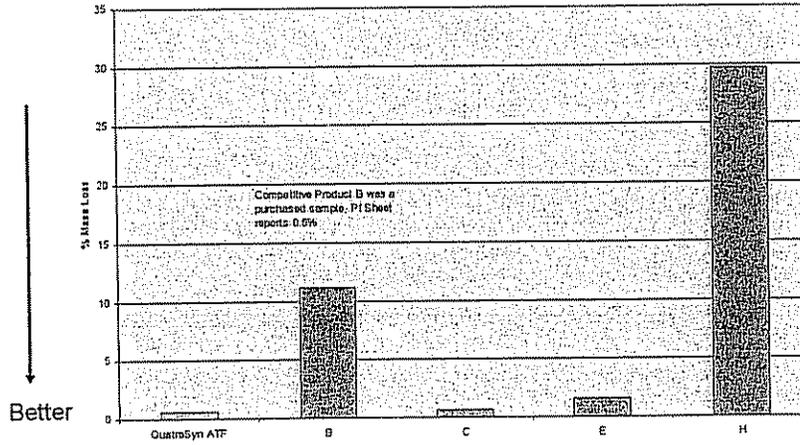


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Comparison of Synthetic ATF Properties

Synthetic ATF Noack Volatility

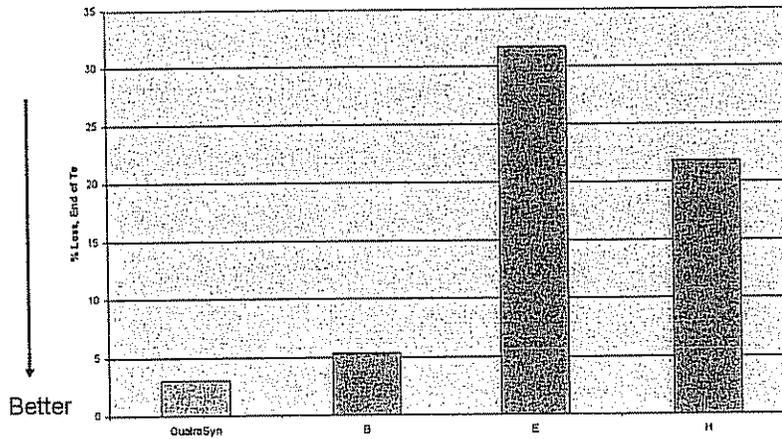


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Comparison of Synthetic ATF Properties

Shear Stability (CEC L-45-20)

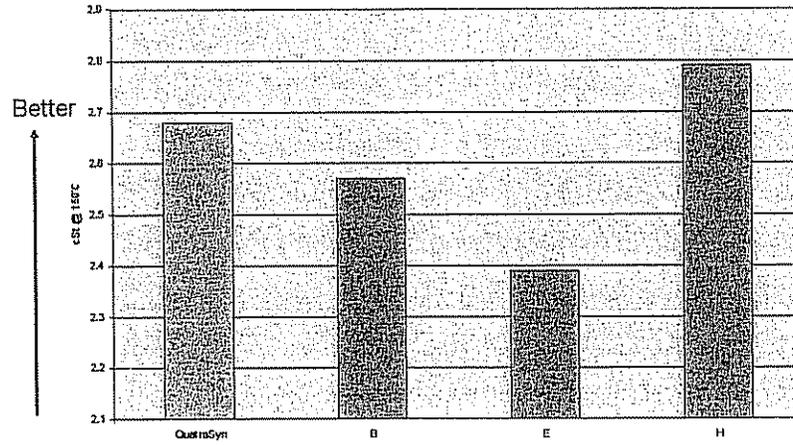


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Comparison of Synthetic ATF Properties

Shear Stability (HT/HS Viscosity @ 150°C)

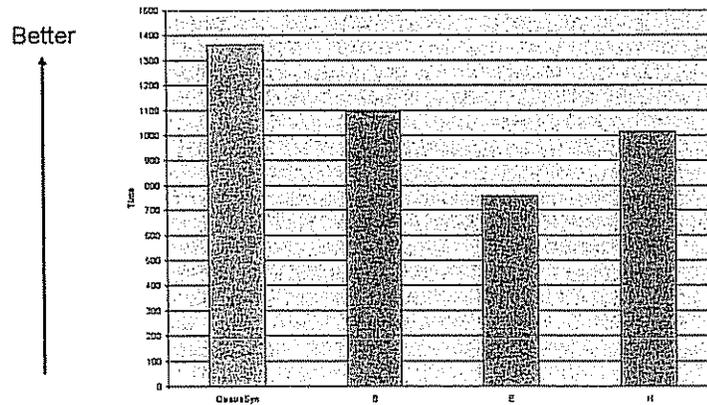


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Comparison of Synthetic ATF Properties

Oxidation Stability
RPVOT



Mystik



April 26, 2000

Mr. Richard J. Patrick
Product Specialist
Citgo Petroleum
P.O. Box 3758
Tulsa, OK 74102-3758

Dear Dick

Subject: Citgo Pacemaker 1615 15W-40 for Detroit Diesel Corp. Series 50G engines

In response to your inquiry regarding the engine oil requirements for DDC Series 50G natural gas fueled engines and the possible use of Citgo Pacemaker 1615 15W-40. Since no industry performance category exists for identification of the proper engine oils for these engines DDC has adopted a list of recommended oils based on field experience and their performance in the engine during product development.

To accommodate the needs of transit customers other oils have been identified which use identical additive technology. Therefore oils formulated with OLOA 1255 at a 10.1% mass treatment rate have been accepted as alternates to the recommended products listed in DDC publication 7SE272. I have received written communication that Citgo Pacemaker 1615 15W-40 is formulated with OLOA 1255 at the prescribed treatment rate. Based upon this information, Pacemaker 1615 can be recommended for this service. I have recommended that customers confirm the chemical profile as:

Calcium - 1200 ppm, Phosphorous - 280ppm, Zinc - 303 ppm, and TBN (D2896) - 5.1.

Should this information be inaccurate, please notify me as soon as possible. If you have any further comments or questions, do not hesitate to contact me.

Sincerely,

A handwritten signature in cursive script that reads "Danny E. Larkin".

Danny E. Larkin
Fuels and Lubricants

/

cc:



Friday, June 20, 2003

Mr. David Clark
CITGO
4500 S. 129th E. Ave.
Tulsa, OK 74134

Dear Mr. Clark:

Subject: Applicability of Citgard Natural Gas SAE 15W-40 Engine Oil in
DDC Series 50G and S60G Engines

Thank you for providing information about the Citgard Natural Gas SAE 15W-40 Engine Oil product for use in natural gas fueled engines. Based upon the information provided, this engine oil has been formulated with OLOA 1255Z. Field testing with this additive technology in DDC engines has shown it to perform similarly to OLOA 1255, therefore oils formulated with OLOA 1255Z at 10.81 % mass treat rate in Group I and II base stocks with a non-dispersant viscosity index improver are acceptable for use in DDC Series 50G and Series 60G engines.

Thank you for providing the documentation for my review. Please contact me at 313-592-5970 should you have any questions.

Sincerely,

A handwritten signature in cursive script that reads "Mesfin Belay".

Mesfin Belay
Fuels and Lubricants

cc:

T. Bistue
D. Karineami
G. Lysinger
J. Reinhart
J. Zhu



Cummins Inc.
Box 3005
Columbus, Indiana
47202-3005



December 20, 2002

David Clark
CITGO Petroleum Corporation
P.O. Box 3758
Tulsa, Oklahoma 74102

Dear David,

CONFORMANCE TO CES 20074 ENGINE OIL SPECIFICATION

Results from tests according to CES 20074 have been presented to Cummins. In view of the results I would like to give the following comments.

The results have been found to be within the CES 20074 limits and hence oils formulated as stated in your request can be labeled as conformance to CES 20074.

The oils shall be used per the ambient temperature and SAE grade guidelines in the engine specific Operation and Maintenance (O & M) manual, as well as, in any Cummins service documents.

Please notify Cummins Inc. if the formulation of this product changes.

Brand Name: CITGARD NATURAL GAS 15W40
SAE Grade: 15W40

I hope this information will be of assistance to you.

Sincerely,

A handwritten signature in black ink, appearing to read 'Warren A. Totten'.

Warren A. Totten
Fuels and Lubricants

DISCLAIMER: Product registration means the manufacturer or marketer has faithfully collected information pertinent to the requirements of the specification, and with the full intention to conform to the specification. However, it is still the responsibility of the manufacturer or marketer to ensure satisfactory performance of its products in all aspects at all times. Registration for CES 20074 does not waive product liability of the manufacturer or marketer. Cummins does not warrant the performance of non-Cummins products, registered or not.

Phone: 812-377-5000
Facsimile: 812-377-3334

Revision Date: February 25, 2002



CITGO QuatraSyn Transmission Fluid

Date 07/04

DESCRIPTION: CITGO's QuatraSyn Synthetic Transmission Fluid is the next generation in automatic transmission fluids. QuatraSyn is engineered to offer extended service intervals and remain stable under extremely severe operating conditions.

QUALITIES: CITGO's QuatraSyn Synthetic Transmission Fluid is engineered with a proprietary combination of synthetic base stocks and additives. This synergistic combination of components is designed to work in harmony with the transmission components while offering the very best in fluid life and performance.

CITGO's QuatraSyn Synthetic Transmission Fluid provides:

- Extended drain and filter change intervals resulting in reduced oil disposal cost.
- Outstanding low temperature performance.
- Excellent thermal and oxidation stability resulting in better transmission performance through a reduction in sludge and deposit formation.
- QuatraSyn contains NO viscosity modifiers, resulting in high shear stability
- QuatraSyn unique formulation offers low traction coefficients which can result in increased fuel economy

APPLICATIONS: CITGO's QuatraSyn Synthetic Transmission Fluid is intended for use in the following universal powershift and automatic transmission applications:

- School Buses and Vans
- Refuse Fleets
- Commercial Trucks and Vehicles
- Motorhomes
- Emergency Vehicles
- On/Off-Highway Vehicles
- Inter/Intracity Buses
- Light Duty Pickup Trucks and Passenger Cars

CITGO's QuatraSyn Synthetic Transmission Fluid meets the OEM requirements for most domestic transmissions and is recommended for use in applications which call for the products meeting the following specifications:

Allison TES 295	Allison C-4
Voith Transmissions	ZF Transmissions

QuatraSyn is recommended for use in all GM and Ford Transmissions except those calling for Ford SP-1, Ford Type F and all CVT Fluids.

TYPICAL PROPERTIES:

CITGO QuatraSyn Synthetic ATF

Material Code	632493001
Gravity, ASTM D 237, °API	37.1
Specific Gravity, D 4052	0.839
Pounds per Gallon	6.99
Flash Point ASTM D 92, °F (°C)	432 (222)
Viscosity ASTM D 445,	
cSt at 100°C	7.25
cSt at 40°C	36.48
Viscosity Index	171
Brookfield Viscosity ASTM D-2983	
cP at -40°C	8,200
cP at -20°C	1,025
Pour Point ASTM D-97, °F (°C)	<-87 (<-66)
Total Acid Number, ASTM D 664, mg KOH/gm	1.03
4-Ball Wear, ASTM D-2266	0.48
40kg, 1200 rpm, 1 hour,	
Cold Cranking Simulator, ASTM D 5293, cP at -30°C	2260

CITGO PACEMAKER® GAS ENGINE OIL 1600 SERIES



Date 02/04

DESCRIPTION: CITGO Pacemaker® Gas Engine Oil 1600 Series oils are superior low ash, low phosphorus gas engine oils with a balanced advanced additive package to meet API CD quality performance and non-selective catalytic converter requirements. These new generation oils deliver a superior level of cleanliness — with excellent wear protection with a low ash formula that complies with manufacturers' warranties.

Formulated with the latest generation additives and highest quality base stocks available, CITGO Pacemaker® Gas Engine Oil 1600 Series oils are unsurpassed in performance.

- QUALITIES:**
- Contain special dispersants and detergents to insure a cleaner, longer running engine.
 - Control deposits and minimize wear of pistons, rings, and liners.
 - Retain TBN to neutralize combustion acids from sour gas.
 - Effectively control oxidation and nitration which create sludge that thickens the oil, plugs filters and causes excessive foaming.
 - Minimize valve recession to provide longer head life

APPLICATIONS: CITGO Pacemaker® Gas Engine Oil 1600 Series oils are low ash oils suitable for a wide range of engines operating on virtually any variation of natural or synthetic gas, gas from digester or landfill sources or fuels containing low levels of sulfur and chlorofluorocarbons (CFC) **Note:** In high CFC/sour gas applications, an oil with a higher base reserve may be required.

These oils are recommended for high and medium speed 4-cycle engines manufactured by Caterpillar, Waukesha, Superior, Cooper-Bessemer; Cummins, Dresser-Rand (Categories I, II and III), as well as low-speed engines manufactured by Cooper-Bessemer and Worthington C4-Cycle.

CITGO Pacemaker® Gas Engine Oil 1640LP is a specially formulated SAE 40 grade product that exhibits superior low temperature properties, compared with other monograde oils. This low pour product is particularly well suited for applications where improved low temperature fluidity is needed, but a monograde oil is recommended by the engine manufacturer.

- | | | |
|-------------------------------|----------------------------------|----------------------------------|
| CUSTOMER
BENEFITS: | • Cleaner pistons | • Catalyst compatible |
| | • Minimum oil viscosity increase | • Clean crankcases and top decks |
| | • Low wear | • Reduced valve recession |
| | • Improved TBN retention | |

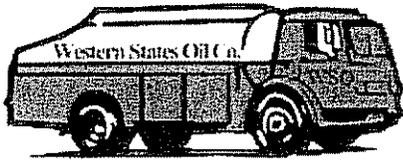
CITGO CITGARD® NATURAL GAS 15W40
ENGINE OIL

Date 02/04

- DESCRIPTION:** CITGARD® Natural Gas 15W40 Engine Oil is specially formulated for compressed natural gas (CNG) engines in transit operation. It is available as an SAE 15W-40 viscosity grade. Building on CITGO's long heritage of outstanding gas engine oils for stationary applications, CITGARD® NATURAL GAS 15W40 ENGINE OIL provides the protection needed in today's demanding mobile CNG applications.
- QUALITIES:** CITGARD® Natural Gas 15W40 Engine Oil is formulated with base stocks specially selected for compressed natural gas operation, proven additives and a shear stable VI improver. This unique combination provides protection against deposits in the higher temperature natural gas combustion chamber. Liner and tappet wear protection far exceed original equipment manufacturer's requirements. CITGO's combination of components provides excellent cold pumpability, foam protection, exceptional oxidation and nitration control, overall engine cleanliness, and reduced oil consumption.
- APPLICATIONS:** CITGARD® Natural Gas 15W40 Engine Oil exceeds the requirements for Cummins Engine Company CES 20074 and is recommended for Cummins L-10, "B" and "C" series CNG engines. CITGARD® NATURAL GAS 15W40 ENGINE OIL is recommended for applications of Detroit Diesel included in their 7SE272 publication, including Series 50G and 60G natural gas engines. Mack Trucks and John Deere also call for this quality of oil in their natural gas fueled engines. CITGARD® NATURAL GAS 15W40 ENGINE OIL is also suitable for use with other gaseous fuels such as liquefied natural gas and LPG. Always consult your owner's manual for correct oil recommendations.

TYPICAL PROPERTIES:**CITGARD® NATURAL GAS 15W40 ENGINE OIL**

SAE Grade	15W-40
Material Code	632015001
API Service Category	CD
Gravity, ASTM D 4052, °API	29.5
Pounds Per Gallon	7.3
Flash Point, ASTM D92, °F, (°C)	437, (225)
Viscosity ASTM D445, cSt at 40°C	124
cSt at 100°C	15
Viscosity Index, ASTM D2270	125
Pour Point, ASTM D97, °F, (°C)	-17, (-27)
Sulfated Ash, ASTM D 872, %	0.56
Total Base Number, ASTM D2896	5.3



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www.lubeoil.com

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FAX (510) 895-5345

GASOLINE
DIESEL
MOTOR OILS

October 14, 2004

Al DeNurra, Senior Buyer
A C Transit, Purchasing Dept.
10626 International Blvd.
Oakland, CA 94603

Subject: IFB 2004-879RTCC

The following information is being provided per your letter dated October 12, 2004 for IFB 2004-879RTCC.

TS-1 Citgo Transgard Dexron III / Mercon

Voith Approval Number G34059 *OK*
Allison C-4 Approval Number 29903800 *OK*

TS-2 Mobil 1 Synthetic ATF

Voith Approval Number G34036 *OK*
Allison C-4 Approval Number 18921793 *OK*

TS-3 Castrol TranSynd

Voith Approval Number G34010 *OK*
Allison TES-295 Approval Number AN-011001 *OK*

TS-4 Exxon XD-3 30W and 40W

	<u>30W</u>	<u>40W</u>
API Classification	CF-2	CF-2
Sulfate Ash, % mass D874	0.8 %	0.8%
Alkalinity D2896	7.3	7.3 —
Viscosity Index	98	98
Pour Point C	-30	-30 —
Flash Point C	258	256
Total Base Number D2896	7.3	7.3 —
Zinc, ppm	1410	1410
Phosphorous, ppm	1280	1280 —

TS-5 Citgo Pacemaker 1615 for Cummins L-10G
Citgo Natural Gas 15W-40 for Cummins B5.9G/LPG

	<u>Pace 1615</u>	<u>NG 15W-40</u>
Sulfated Ash, D874	0.45% —	0.55% —
TBN, D2896	5.4	5.2 —
TAN, D664	0.5	0.8 —
Phosphorous, ppm	270	702
Zinc, ppm	330	778
Calcium, ppm	1300	1200
Copper Corrosion, D130	N/A	1A
Lead Increase, D5968	N/A	<50
Tin Increase	N/A	<20

TS-7 Mobil Aero HF

Mil Spec H-5606G

TS-8 Exxon Nuto H 46

TS-9 Mobilube HD Plus 85W-140

TS-10 Exxon Superflo 5W-30

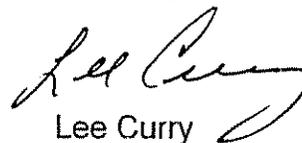
TS-11 Citgo Premium Lithium EP 2

TS-12 Citgo Lithoplex MP 2

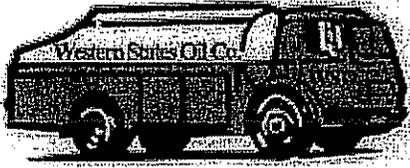
Attached are the Product Data sheets for each of the proposed products, as well as, the transmission manufacturer's (Voith and Allison) approved products bulletins, and the product manufacturer's (ExxonMobil, Citgo and Castrol) technical specifications which support the above information.

Should you have any questions or need additional information, please contact me @ 925/200-9270. Thank you.

Sincerely,



Lee Curry



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GASOLINE
 DIESEL
 MOTOR OILS

September 27, 2004

AC Transit District
 Purchasing Department
 10626 International Blvd
 Oakland CA 94603

Title: Lubrication Products
 Contract Bid #2004-879RTCC

Thank you for the opportunity to present our lubrication proposal. The table shows the proposed product, package style and price (product data sheets and MSDS attached).

TS #	Proposed Product	Package Style	Price
1	Citgo Transgard Dexron III / Mercon	Bulk/Drum	\$ 3.70 /G
2	Mobil 1 Synthetic ATF	Bulk	\$14.25 /G
3	Citgo Quatrasyn Synthetic Transmission Fluid	Bulk/Drum	\$10.00 /G
*3	Castrol TranSynd	Bulk/Drum	\$23.25 /G
4	Exxon XD-3 Engine Oil 30W & 40W	Drum	\$ 3.65 /G
5	Citgo Pacemaker 1615 (or) <u>Citgo Citgard Natural Gas 15W-40</u>	Bulk/Drum	\$ 5.10 /G
6	Citgo Pacemaker 1615	Bulk/Drum	\$ 5.10 /G
7	Chevron Aviation Hydraulic Fluid A	Drum	\$ 8.05 /G
*7	Mobil Aero HF	Drum	\$ 9.25 /G
8	Exxon Nuto H 46	Drum	\$ 3.30 /G
9	Mobilube HD Plus 85W-140	Drum	\$0.595 /LB
10	Exxon Superflo 5W-30	Drum	\$ 3.57 /G
11	Citgo Premium Lithium EP 2	Drum	\$ 0.84 /LB
12	Citgo Lithoplex MP 2	Keg	\$ 1.07 /LB

our choice
SA

* TS-3 – If Citgo Quatrasyn not approved by A C Transit use Castrol TranSynd
 TS-7 – If Chevron Aviation Fluid A not approved by A C Transit use Mobil Aero HF

Payment terms are 2% - 15 days, net 30 days. Pricing is on a delivered basis and excludes applicable excise taxes and sales tax.

Western States Oil Company is a Minority Business Enterprise pursuant to California Public Utilities Commission General Order 156, copy attached.

It is our commitment to provide quality products, technical support and friendly service that exceed your expectations. Should you have any questions or need additional information, please contact me @ 408/292-1041. Thank you for your consideration.

Sincerely,

 Lee Curry
 General Manager

C4 Approved Fluids List
Allison Transmission Division
General Motors Corporation
(2/12/01)
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OIL SUPPLIER	PRODUCT BRAND NAME	GM LICENSE No.	API	OIL TYPE	GRADE	MARKET PLACE	APPROVAL No.
CHEVRON U.S.A. INC.	CHEVRON RPM DELO MOTOR OIL SAE 15W-40		CE/SG		15W-40	1,2	C4-10800289
CHEVRON U.S.A. INC.	CHEVRON RPM HDMO SAE 15W-40		CF4/SH		15W-40	1	C4-21092295
CHEVRON U.S.A. INC.	CHEVRON DELO 400 PLUS MOTOR OIL SAE 30		CE/SG		30	1,2	C4-12850390
CHEVRON U.S.A. INC.	CHEVRON DELO 400 SAE 30		CF2/SH		30	1	C4-21912495
CHEVRON U.S.A. INC.	CHEVRON DELO 400 SAE 30		CF2/SH		30	1	C4-22232596
CHEVRON U.S.A. INC.	CHEVRON RPM DELO MOTOR OIL SAE 30		CE/SG		30	1,2	C4-10790289
CHEVRON U.S.A. INC.	CHEVRON RPM HDMO SAE 30		CE/SH		30	1	C4-20922194
CHEVRON U.S.A. INC.	CHEVRON AUTOMATIC TRANSMISSION FLUID	F-30159			ATF	1,2	C4-19571894
CHEVRON U.S.A. PRODUCTS CO.	CHEVRON DRIVE TRAIN FLUID HD			C-4 Only	30	1,2	C4-19701894
CHEVRON U.S.A. PRODUCTS CO.	CHEVRON AUTOMATIC TRANSMISSION FLUID	F-30108			ATF	1,2,5,6,11	C4-20052094
CHRYSLER CANADA LTD.	CHRYSLER MOPAR TURBO XD 15W-40 DIESEL ENGINE OIL			C-4 Only	15W-40	1,2	C4-29083699
CHRYSLER CANADA LTD.	MOPAR TURBO XD 15W-40 DIESEL ENGINE OIL		CF4/SH		15W-40	2	C4-21432295
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCON	F-30766			ATF	1,2,8	C4-24953097
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCON	G-34438			ATF	1,2,8	C4-29183699
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCON	F-30227			ATF	2	C4-18621793
CHRYSLER CANADA LTD.	CHRYSLER MOPAR ATF DEXRON III/MERCON	F-30249			ATF	2	C4-18701793
CIA BRASIL DE PETROLEO	ULTRAMO TURBO 30		CF		30	6	C4-29403700
CIA.BRASILLEIRA PETROLEO IPIRANGA	ISAMATIC III	G-34202			ATF	6	C4-29953800
CITGO PETROLEUM CORP.	CITGO TRANSPower FLUID, 10W			C-4 Only	10W	1,2	C4-20011994
CITGO PETROLEUM CORP.	CITGO TRANSPower FLUID, SAE 10W			C-4 Only	10W	1,2,5,6,8	C4-16641192
CITGO PETROLEUM CORP.	CITGO TRANSPower FLUID, SAE 30			C-4 Only	30	1,2,5,6,8	C4-16631192
CITGO PETROLEUM CORP.	CITGO TRANSPower, 30			C-4 Only	30	1,4,5,6	C4-19711894
CITGO PETROLEUM CORP.	CITGARD 500 MOTOR OIL SAE 10W-30		CE/SG		10W-30	1,2,4,5,6,8	C4-11020189
CITGO PETROLEUM CORP.	CITGARD 500 MOTOR OIL SAE 15W-40		CE/SG		15W-40	1,2,4,5,6,8	C4-11030189
CITGO PETROLEUM CORP.	CITGARD 500 MOTOR OIL SAE 30		CE/SG		30	1,2,4,5,6,8	C4-11010189
CITGO PETROLEUM CORP.	CITGARD 500 SAE 30		CE/SG		30	1,2,4,5,6,8,11	C4-17111292
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	G-34059			ATF	1	C4-29903800
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	F-30167			ATF	1,2,4,5,6,8	C4-22902696
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	F-30338			ATF	1,2,5,6,8	C4-21172295
CITGO PETROLEUM CORP.	CITGO MP AUTOMATIC TRANSMISSION FLUID DEXRON-III/MERCON	F-30165			ATF	1,2,6,8	C4-22912696
COASTAL UNILUBE INC.	COASTAL PREMIUM DEXRON III / MERCON ATF	G-34196			ATF	1,2,3,4,5,6,7,8,11	C4-28643699
COASTAL UNILUBE INC.	COASTAL UNILUBE	F-30375			ATF	1,4,5,6,8,11	C4-21542395
COASTAL UNILUBE INC.	COASTAL UNILUBE DEXRON III / MERCON	F-30491			ATF	1,2,3,4,5,6,8,11	C4-22882596
COASTAL UNILUBE INC.	UNILUBE DEXRON III MERCON ATF	F-30204			ATF	12	C4-18881793
COASTAL UNILUBE INC.	UNILUBE DEXRON III MERCON ATF	F-30310			ATF	12	C4-19931994
COFRAN RECHERCHE SARL	COFRAN SINTOFLUID			C-4 Only	ATF	3,4,5,6,7,8	C4-11840289
COGNIS CORPORATION	EMGARD 2803 SYNTHETIC DEXRON-III/MERCON FLUID	G-34494			ATF	12	C4-29463700
COMPANHIA BRASILEIRA DE PETROL	ULTRAMO TURBO CT SAE 30			C-4 Only	30	6	C4-27583500
COMPANIA GENERAL DE LUBRICANTE	EXXOLUBE XD-3 30		CF2/SH		30	6,8,11	
CONOCO INC.	HYDROCLEAR (TM) POWERDRIVE FLUID SAE 10W			C-4 Only			
CONOCO INC.	POWERDRIVE 44 SAE 10W						
CONOCO INC.	HYDROCLEAR (TM) POWERDRIVE FLUID SAE 30						
CONOCO INC.	POWERDRIVE 44 SAE 30						
CONOCO INC.	FLEET HD MOTOR OIL SAE 10W						
CONOCO INC.	FLEET HD MOTOR OIL SAE 15W-40						
CONOCO INC.	HD FLEET SUPREME ENGINE OIL SAE 15W-40						
CONOCO INC.	FLEET HD MOTOR OIL SAE 30						
CONOCO INC.	CONOCO HYDROCLEAR DEXRON III/MERCON ATF	F-30725					
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSMISSION FLUID	F-30118					
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSMISSION FLUID	F-30456					
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSMISSION FLUID	F-30578					
CONOCO INC.	DEXRON III / MERCON AUTOMATIC TRANSMISSION FLUID	F-30158					
CONOCO INC.	HYDROCLEAR DEXRON III / MERCON ATF	F-30371					
CONOCO INC.	HYDROCLEAR MERCON V / DEXRON III ATF	G-34076					

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EQUIPMENT MANUFACTURERS

OIL MANUFACTURERS

APPROVALS

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C4 Approved Fluids List
Allison Transmission Division
General Motors Corporation
(2/12/01)
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OIL SUPPLIER	PRODUCT BRAND NAME	GM LICENSE No.	API	OIL TYPE	GRADE	MARKET PLACE	APPROVAL No.
MOBIL OIL CORP.	MOBIL AUTOMATIC TRANSMISSION FLUID 220			C-4 Only	ATF	3,4,5,7,9,10	C4-21132295
MOBIL OIL CORP.	MOBIL DELVAC 1310		CF		10W	1,2	C4-15000691
MOBIL OIL CORP.	MOBIL DELVAC 1310		CF/SF		10W	1,2	C4-25783197
MOBIL OIL CORP.	MOBIL DELVAC 1310		CF		10W	1,2	C4-26723398
MOBIL OIL CORP.	MOBIL DELVAC 1310		CF/SG		10W	3,4,5,6,7,8,9,10,11	C4-21742395
MOBIL OIL CORP.	MOBIL DELVAC 1310		CF/SF		10W	3,4,5,6,7,8,9,10,11	C4-24782997
MOBIL OIL CORP.	MOBIL DELVAC 1310		CF/SF		10W	4	C4-25823197
MOBIL OIL CORP.	MOBIL DELVAC 1310		CF		10W	4	C4-28423699
MOBIL OIL CORP.	MOBIL DELVAC HP 10		CF/SF		10W	3,4,5,6,7,8,9,10,11	C4-25303097
MOBIL OIL CORP.	MOBIL AGRI SUPER 10W-30		SF		10W-30	12	C4-24462896
MOBIL OIL CORP.	MOBIL AGRI 1 10W-40		SG		10W-40	12	C4-24362896
MOBIL OIL CORP.	MOBIL AGRI EXTRA 10W-40		SF		10W-40	12	C4-24482896
MOBIL OIL CORP.	MOBIL DELVAC MULTISERVICE 10W-40		CE/SF		10W-40	2,3,4,5,6,7,8,9,10,11	C4-15070791
MOBIL OIL CORP.	DELVAC 1200 SUPER		CE/SG		15W-40	3,4,5,6,7,8,9,10,11	C4-13570490
MOBIL OIL CORP.	DELVAC 1300 SUPER		CE/SF		15W-40	3,4,5,6,7,8	C4-12950390
MOBIL OIL CORP.	DELVAC 1300 SUPER		CE/SG		15W-40	3,4,5,6,7,8,9,10,11	C4-13450490
MOBIL OIL CORP.	DELVAC 1300 SUPER SAE 15W-40		CF4/SG		15W-40	3,4,5,6,7,8,9,10,11	C4-13700590
MOBIL OIL CORP.	DETROIT DIESEL POWERGUARD 15W-40		CF		15W-40	1,2,6,8,9,10,11	C4-26283298
MOBIL OIL CORP.	MOBIL AGRI PRO 15W-40		SF		15W-40	12	C4-24372896
MOBIL OIL CORP.	MOBIL DELVAC 1200 SUPER		CF4/SG		15W-40	3,4,5,6,7,8,9,10,11	C4-15520891
MOBIL OIL CORP.	MOBIL DELVAC 1200 SUPER 15W-40		CE/SG		15W-40	1,2	C4-11330289
MOBIL OIL CORP.	MOBIL DELVAC 1200 SUPER 15W-40		CE/SG		15W-40	1,2	C4-15830991
MOBIL OIL CORP.	MOBIL DELVAC 1200 SUPER 15W-40		CE/SG		15W-40	1,2	C4-15970991
MOBIL OIL CORP.	MOBIL DELVAC 1300 SUPER 15W-40		CE/SG		15W-40	1,2	C4-15150791
MOBIL OIL CORP.	MOBIL DELVAC 1300 SUPER 15W-40		CF4/SH		15W-40	1,2	C4-21412295
MOBIL OIL CORP.	MOBIL DELVAC 1300 SUPER 15W-40		CE/SF		15W-40	3,4,5,6,7,8,9,10,11	C4-15010691
MOBIL OIL CORP.	MOBIL DELVAC 1300 SUPER 15W-40		CE/SG		15W-40	3,4,5,6,7,8,9,10,11	C4-15910991
MOBIL OIL CORP.	MOBIL DELVAC 1400 SUPER		CE/SF		15W-40	3,4,5,6,7,8,9,10,11	C4-14750691
MOBIL OIL CORP.	MOBIL DELVAC MX		CF4/SH		15W-40	3,4,5,6,7,8,9,10,11	C4-25523097
MOBIL OIL CORP.	MOBIL DELVAC SUPER 1300		CF4/SG		15W-40	3,4,5,6,7,8,9,10,11	C4-15660991
MOBIL OIL CORP.	MOBIL DELVAC SUPER 1300		CF4/SG		15W-40	3,4,5,6,7,8,9,10,11	C4-16281092
MOBIL OIL CORP.	MOBIL DELVAC SUPER 1300		CF4/SH		15W-40	3,4,5,6,7,8,9,10,11	C4-22192596
MOBIL OIL CORP.	MOBIL DELVAC SUPER 1300		CF4/SH		15W-40	3,4,5,6,7,8,9,10,11	C4-22402596
MOBIL OIL CORP.	MOBIL DELVAC SUPER 1300		CF4/SH		15W-40	3,4,5,6,7,8,9,10,11	C4-22472596
MOBIL OIL CORP.	VANELUS C3 MULTIGRADE		CF/SG		15W-40	3,4,5,6,7,8,9,10,11	C4-26903498
MOBIL OIL CORP.	MOBIL DELVAC 1230		CE/SG		30	1,2	C4-12440390
MOBIL OIL CORP.	MOBIL DELVAC 1330		CF		30	1,2	C4-14990691
MOBIL OIL CORP.	MOBIL DELVAC 1330		CF4/SF		30	1,2	C4-24032896
MOBIL OIL CORP.	MOBIL DELVAC 1330		CF/SF		30	1,2	C4-25793197
MOBIL OIL CORP.	MOBIL DELVAC 1330		CF		30	1,2	C4-26713398
MOBIL OIL CORP.	MOBIL DELVAC 1330		CF/SF		30	3,4,5,6,7,8,9,10,11	C4-15630891
MOBIL OIL CORP.	MOBIL DELVAC 1330		CF/SG		30	3,4,5,6,7,8,9,10,11	C4-15650991
MOBIL OIL CORP.	MOBIL DELVAC 1330		CE/SG		30	3,4,5,6,7,8,9,10,11	C4-16431092
MOBIL OIL CORP.	MOBIL DELVAC 1330		CF/SG		30	3,4,5,6,7,8,9,10,11	C4-21752395
MOBIL OIL CORP.	MOBIL DELVAC 1330		CF2/SF		30	3,4,5,6,7,8,9,10,11	C4-23272696
MOBIL OIL CORP.	MOBIL DELVAC 1330		CF2/SF		30	3,4,5,6,7,8,9,10,11	C4-24792997
MOBIL OIL CORP.	MOBIL DELVAC 1330		CF		30	3,4,5,6,7,8,9,10,11	C4-26053298
MOBIL OIL CORP.	MOBIL DELVAC 1330		CF/SF		30	4	C4-25833197
MOBIL OIL CORP.	MOBIL DELVAC 1330		CF		30	4	C4-28433699
MOBIL OIL CORP.	MOBIL DELVAC HP 30		CF/SF		30	3,4,5,6,7,8,9,10,11	C4-25313097
MOBIL OIL CORP.	MOBIL AGRI SUPER 20W-40		SF		40	12	C4-24472896
MOBIL OIL CORP.	MOBIL 1 SYNTHETIC AUTOMATIC TRANSMISSION FLUID	F-30126			ATF	12	C4-18921793
MOBIL OIL CORP.	MOBIL AUTOMATIC TRANSMISSION FLUID	F-30107			ATF	12	C4-19321894
MOBIL OIL CORP.	MOBIL AUTOMATIC TRANSMISSION FLUID	F-30127			ATF	12	C4-20832194

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"Pour on the Productivity"

Ask your nearest Allison distributor or dealer about TranSynDTM Synthetic Automatic Transmission Fluid



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Warranty Information

Frequently Asked Questions

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TES- 295 Approved Fluids

When seeking a fluid for your Allison transmission that is TES 295 approved do not fall to the claims of some companies that claim that their product is TES-295 approved. The statements infer that these products "are designed to meet", "are equivalent to", "meet or exceed", etc. When determining whether or not a fluid is TES-295 approved, look and/or ask for one of two things:

- The Allison TES-295 approval number
- The Allison Approved logo

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- TranSynd™ RD for Off Highway
- Oil Analysis
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	TES 295 Approval Number	Approved Marketer	Product Brandname
<i>TS-3</i> →	AN-011001	Castrol Heavy Duty Lubricants	TranSynd
	AN-031002	BP	Autran Syn 295
	AN-031003	Cognis Corporation	Emgard 2805
	AN-031004	International Truck & Engine Company	Fleetrite Synthetic ATF



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Voith Turbo

DIWA Service Bulletin

Service Bulletin #0130

Issued Date: July 06, 2004

Replaces Service Bulletin #013N

Revised Date: July 06, 2004

Transmissions: All DIWA

Subject: Automatic Transmission Fluids (ATF) for DIWA Transmissions – Approved Oils and Change Intervals

Purpose: This document provides a detailed list of Approved ATF Oils for use in the Voith transmission for all DIWA models, procedures to approve additional oils for use, guide lines on oil change intervals, information on extended oil change intervals.

Reference: AN #55.6335.32 & 55.6336.32 (NOT relevant to North America)

APPROVED OILS

See Approved Automatic Transmission Fluid list on page 4 of this service bulletin. **Note:** This list is current as of the revision date found in the header of this document and may be changed as new oil information becomes available.

NOTE: USE OF OILS NOT ON THE APPROVED TRANSMISSION FLUID LIST COULD HAVE ADVERSE EFFECTS ON THE TRANSMISSION AND VOID WARRANTY.

ADDITIONAL OIL APPROVAL PROCEDURES

If the oil you are using is not on the approved list:

- 1 Have your oil supplier fill out the "Data Sheet for Automatic Transmission Fluids", which is the last page of this document. **Note: if all spaces for the required information on this sheet are not filled in completely the application will be rejected and returned to you.**
- 2 Submit the completed form to Voith Turbo, Inc for approval consideration along with a 1 pint sample of the virgin oil and a laboratory analysis report on the original product. The analysis will cover the following items: Acid Number (ASTM D664 mod), Viscosity at 40 and 100 deg C, Metals (Fe, Al, Cr, Cu, Pb, Sn, Ni, Ag, Si, Na, B, Zn, P, Ca, Mg, Ba, Mo, K) **All information supplied will be kept strictly confidential.**
- 3 Voith will notify you of approval/non-approval after review

Oil and Filter Drain Intervals on DIWA.2 and DIWA.3 Transmissions with Spin-on Filters Installed.

36,000 Mile Oil Change Intervals are defined in the attached list:

- 1 Use of a **36,000 MILE MINERAL BASE OR SEMI-SYNTHETIC TRANSMISSION FLUID;**
 - a The **Oil Change** interval is **36,000 MILES OR 1 (ONE) YEAR**, whichever comes first
 - b The spin-on **Filter Change** interval is **18,000 MILES OR 6 (SIX) MONTHS**, whichever comes first



Voith Turbo

DIWA Service Bulletin

Service Bulletin #0130

Issued Date: July 06, 2004

Replaces Service Bulletin #013N

Revised Date: July 06, 2004

72,000 Mile Oil Change Intervals are defined in the attached list:

- 2 Use of a 72,000 MILE SYNTHETIC TRANSMISSION FLUID;
 - a The Oil Change interval is **72,000 MILES OR 2 (TWO) YEARS**, whichever comes first
 - b **Filter Change** interval is **18,000 MILES OR 6 (SIX) MONTHS**, which ever comes first

- 3 Requirements for 72,000 mile oil change intervals while units are in warranty:
 - a Oil sampling and analysis of the ATF for each transmission at the oil filter change (18,000 miles maximum)
 - b Analysis results are compared to the standards established in Service Bulletin Number 4A
 - c If irregularities are found in the oil, follow resample guidelines provided by your analysis company
 - d If irregularities continue in future oil samples, your oil analysis company will recommend the course of action. This may include pulling the oil pan and conducting a bottom end inspection of the transmission
 - e In the event there is a warrantable problem with the transmission, Voith Turbo, Inc. will require the following information for evaluation:
 - i A copy of the current oil analysis along with the past three analysis reports for comparison and evaluation. **ALL** oil analysis sheets must be available for evaluation by Voith. Failure or inability to provide these records will result in voiding of all warranties. **THERE WILL BE NO EXCEPTIONS.**
 - ii Oil type {Company Name, Product Name & Approval Number (If available)}

Oil and Filter Drain Intervals on All Newly Delivered and Newly Rebuilt Transmissions.

Oil and filter changes for new and rebuilt transmissions are outlined as follows.

- 1 Initial Oil and Filter Changes are made at the time of receipt of the vehicle or rebuild of transmission up to a **maximum of 2,500 miles**
- 2 The second oil and filter changes are made at a maximum of 9,000 miles after the first oil and filter change **up to 11,500 miles maximum**
- 3 Standard or extended oil change intervals will commence after the second oil and filter change

NOTE: By using a genuine Voith oil filter, you are ensured of proper oil filtration and protection of your transmission

NOTE: Updates to the approval list will be provided in future releases of Service Bulletin 13

VOITH

Voith Turbo

DIWA Service Bulletin

Service Bulletin #0130

Replaces Service Bulletin #013N

Issued Date: July 06, 2004

Revised Date: July 06, 2004

Oil and Filter Drain Intervals on DIWA.3E Transmissions with Filter Installed in Oil Pan.

36,000 Mile Oil Change Intervals are defined in the attached list:

- 1 Use of a 36,000 MILE MINERAL BASE OR SEMI-SYNTHETIC TRANSMISSION FLUID;
 - a The **Oil Change** interval is **36,000 MILES OR 1 (ONE) YEAR**, whichever comes first
 - b **Filter Change** interval is **36,000 MILES OR 6 (SIX) MONTHS**, whichever comes first

72,000 Mile Oil Change Intervals are defined in the attached list:

- 2 Use of a 72,000 MILE SYNTHETIC TRANSMISSION FLUID;
 - a The **Oil and Filter Change** interval is **72,000 MILES OR 2 (TWO) YEARS**, whichever comes first
 - b **Filter Change** interval is **72,000 MILES OR 2 (TWO) YEARS**, whichever comes first.

PLEASE NOTE ABOVE: These transmissions have an internal filter. This type of filter has NO separate change interval from the oil. The filter MUST be changed in accordance with your oil changes intervals.

VOITH

Voith Turbo

DIWA Service Bulletin

Service Bulletin #0130

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Replaces Service Bulletin #013N

Revised Date: July 06, 2004

For Voith model transmissions: DIWA D851.2&.3 & .3E; D854 2&.3; D854G; D863.2&.2W7; &.3; D864.3 &.3E; D864G and D884.3E

Note: The information contained on this list is certified to be current as of the date listed in the issued document field and is accurate only to the limits of the information supplied by the oil manufacturers and on file with Voith Turbo in York PA as the revised document date. This list may be changed or modified at any time without notice if the technical information regarding the oils and supplied to Voith by the oil manufacturers is updated or modified by the oil manufacturers.

	COMPANY NAME (Marketer)	BRAND NAME	Approval Number	Class Base	Drain Interval*
1	76 Lubricants	76 Mercon V ATF	H36011	Mineral	36,000
2	Amsoil Inc.	Amsoil ATF	E25112	Synthetic	72,000
3	BP Oil and Exploration	Autran Dexron III®/ Mercon	F30135	Mineral	36,000
4	Castrol Ltd. Heavy Duty Lube	TranSynd ATF	G34010	Synthetic	72,000
5	Chevron Texaco Global Lubricants	Chevron Synthetic ATF Heavy Duty	G34090	Synthetic	36,000
6	Chevron Texaco Global Lubricants	Texaco Synthetic ATF Heavy Duty	G34090	Synthetic	36,000
7	Chevron Texaco Global Lubricants	Chevron ATF MERCON V	G 34555	Mineral	36,000
8	Chevron Texaco Global Lubricants	Texaco Havoline ATF MERCON V	G34555	Mineral	36,000
9	Citgo Petroleum Corporation	Transgard Dexron® III/ Mercon	G34059	Mineral	36,000
10	Coastal Unilube Inc.	Coastal Dexron III/ Mercon	F30310	Mineral	36,000
11	Cofram Lubricants	Sintofluid	ISO 46-GL4	Semi-Synthetic	36,000
12	Cognis Corp	Emgard 2803 Synthetic ATF	G34494	Synthetic	36,000
13	Conoco Phillips	Mercon V ATF	H36011	Mineral	36,000
14	Delta Petroleum Co.	Mercon V2000	G 34095	Mineral	36,000
15	Exxon Mobil Corp Fairfax Va.	Aamco Synthetic Blend ATF	G34015	Mineral	36,000
16	Exxon Mobil Corp Fairfax Va.	Superflow Synthetic ATF	G34015	Mineral	36,000
17	Exxon Mobil Corp Fairfax Va.	Mobile ATF 220	D21611	Mineral	36,000
18	Exxon Mobil Corp Fairfax Va.	Mobil 1 Synthetic ATF	G34036	Synthetic	36,000
19	Fuchs Lubricants Co	Sintofluid III MTA	H36310	Synthetic	72,000
20	Fuchs Lubricants Co	Titan ATF 3000	D22173	Mineral	36,000
21	Fuchs Lubricants Co	Titan ATF 4000	F30105	Mineral	36,000
22	Fuchs Lubricants Co	Titan ATF 5000	E25112	Synthetic	72,000
23	Kendall	Mercon V ATF	H36011	Mineral	36,000
24	Petro Canada Lubricants	Petro Canada ATF	H36007	Synthetic	72,000
25	Phillips 66	Mercon V ATF	H36011	Mineral	36,000
26	Shell Canada	Donax TG	G34026	Mineral	36,000

- TS-3

- TS-1

- TS-2

QUALIFICATIONS CERTIFIED
September 2002

QPL-5606-31
6 September 2002
SUPERSEDING
QPL-5606-30
29 March 1996

QUALIFIED PRODUCTS LIST
OF
PRODUCTS QUALIFIED UNDER SPECIFICATION
MIL-PRF-5606

**HYDRAULIC FLUID, PETROLEUM BASE,
AIRCRAFT, MISSILE, AND ORDNANCE**

*Effective 29 March 1996, MIL-H-5606G has been declared "Inactive for New Design."
This QPL is applicable on all acquisitions to which MIL-H-5606 or MIL-PRF-5606 is
applied, other than for use in new designs.*

This list has been prepared for use by or for the Government in the acquisition of products covered by the subject specification. Such listing of a product is not intended to, and does not, connote endorsement of the product by the Department of Defense. All products listed herein have been qualified under the requirements for the product as specified in the latest effective issue of the applicable specification. The list is subject to change without notice; revision or amendment of this list will be issued as necessary. The listing of a product does not release the contractor from compliance with the specification requirements. Products are qualified for five years from the qualification approval date.

THE ACTIVITY RESPONSIBLE FOR THIS QUALIFIED PRODUCTS LIST IS THE AIR FORCE MATERIEL COMMAND, ASC/ENOI, BLDG 560, 2530 LOOP ROAD WEST, WRIGHT-PATTERSON AFB OH 45433-7101. THE ACTIVITY RESPONSIBLE FOR QUALIFICATION APPROVAL IS AFRL/MLBT, BLDG 654, 2941 P STREET, WRIGHT-PATTERSON AFB OH 45432-7750.

AMSC N/A

FSC 9150

DISTRIBUTION STATEMENT A. Approved for public release; distribution is unlimited.

CAGE CODE	MANUFACTURER'S DESIGNATION	TEST OR QUALIFICATION REFERENCE	MANUFACTURER'S NAME AND ADDRESS
0JWS4	Arpolube 5606	MLB 02-27 4 Sept 02	<i>Distributed by:</i> Arpol Petroleum Company 2275 Tucker Industrial Rd. Tucker, GA 30084
98308	Brayco Micronic 756	MLB 02-15 21 Mar 02	Castrol Industrial North America Endurance Technology 1001 West 31 st Street Downers Grove, IL 60515 <i>Plant:</i> 5511 District Blvd. Los Angeles, CA 90040
04BH0	Chevron Aviation Hydraulic Fluid G Texaco Aircraft Hydraulic Oil 5606G	MLB 01-08 5 Oct 01 MLB 01-08 5 Oct 01	<i>Distributed by:</i> ChevronTexaco Global Lubricants 6101 Bollinger Canyon Rd., T3066 San Ramon, CA 94583
1PWD8	Invarol FJ 13	MLB 99-02 15 Jun 99	ESSO Saf 2, rue des Martinets 92569 Rueil-Malmaison Cedex, France <i>Plant:</i> ESSO Raffinage S.A.F. Usines Lubrifiants de Port-Jerome/Gravenchon BP70 Notre-Dame-de-Gravenchon 76330 France <i>Distributed by:</i> Exxon Mobil Corp. 3225 Gallows Rd. Fairfax, VA 22037
1PWD8	Mobil Aero HF	MLB 02-22 6 Aug 02	<i>Distributed by:</i> Exxon Mobil Corporation 3225 Gallows Road Fairfax, VA 22037

TS-7 →

CAGE CODE	MANUFACTURER'S DESIGNATION	TEST OR QUALIFICATION REFERENCE	MANUFACTURER'S NAME AND ADDRESS
8Y842	Technolube FB003	MLB 01-04 16 Jul 01	Lubricating Specialties Company Technolube Products Division 8015 Paramount Blvd Pico Rivera, CA 90660-4888 <i>Plant:</i> 3365 E. Slauson Ave. Vernon, CA 90058
F4101	Hydraunycoll FH 51	MLB 01-06 26 Sep 01	Nyco SA 66, Avenue Des Champs-Elysees 51, Rue de Ponthieu 75008 Paris France <i>Plant:</i> Societe Touraisienne de Produits Chimiques Z.I. de Tournai Ouest Rue de l'Ancienne Potence, 22 7503 Tournai Belgium
0HDS4	Petronomics Plus	MLB 02-27 4 Sep 02	<i>Distributed by:</i> Petronomics Mfg. Group, Inc. P.O. Box 644 Hutchison, KS 67504-0644
07950	Royco 756	MLB 02-12 6 Mar 02	Royal Lubricants, Inc. P.O. Box 518 215 Merry Lane East Hanover NJ 07936-3920
3AD00	SENT-5606	MLB 00-10 3 Jan 01	Sentinel Canada Div SLC/LCLS 7300 Rue St-Jacques Montreal, Quebec H4B 1W1 Canada

CAGE CODE	MANUFACTURER'S DESIGNATION	TEST OR QUALIFICATION REFERENCE	MANUFACTURER'S NAME AND ADDRESS
KA832	AeroShell Fluid 41	MLB 02-19 29 May 02	<i>Distributed by:</i> Shell Aviation Ltd. Shell Centre York Road London SE1 7NA United Kingdom

ExxonMobil Lubricants &
Petroleum Specialties
255 27th Avenue
San Francisco, California 94121
(415) 752-2439
john.a.ragunas@exxonmobil.com

John A. Ragunas
Northern California Territory Manager
Commercial Vehicle Lubricants



September 30, 2004

Mr. Al DeNurra, Senior Buyer
Alameda - Contra Costa Transit District
10626 International Boulevard
Oakland, California 94603

SUBJECT: Lubrication Products, Contract Proposal No. 2004-879RTCC

Dear Mr. DeNurra:

Tom Lopes Distributing Co. (dba Western States Oil), a local ExxonMobil lubricants and petroleum specialties distributor, has forwarded to me your request for product information to support their recent bid proposal. The following is provided in response to that request:

TS-2, Synthetic Automatic Transmission Fluid

Mobil 1 Synthetic ATF has undergone industry testing and has obtained the following OEM approvals:

- GM Dexron III: G-34036
- Voith: G34036
- Allison C-4: C4-18921793

TS-4, Heavy Duty Diesel Engine Oils

Exxon XD-3 30 and Exxon XD-3 40 have been tested in accordance with applicable ASTM and SAE procedures, and demonstrate the following properties:

- Alkalinity (ASTM D2896): 7.3
- Zinc: 1410 ppm
- Phosphorus: 1280 ppm

TS-7, Aviation Hydraulic Fluid

Please refer to the attached Qualified Products List (QPL) 5606-31 issued by the Air Force Materiel Command. U.S Military Specification MIL-H-5606G was declared "Inactive for New Design" in March 1996 and has been superseded by U.S Military Specification MIL-PRF-5606. Mobil Aero HF meets both U.S. Military Specifications, MIL-H-5606G and MIL-PRF-5606 (Reference MLB 02-22)

Sincerely,

John A. Ragunas



Sunday, October 03, 2004

To: Al DeNurra-AC Transit

Reference: CITGO Product Data for AC Transit Bid

You requested additional data on CITGO products bid by Western States Oil Company.

1. TS-1 Automatic Transmission Fluid, Mineral Base:
 - a. GM Lic. # G34059
 - b. Voith approval number-based on GM Lic. #G34059 (See Attached Voith Service Bulletin #0130
 - c. Allison C-4 Approval-C4-29903800
2. TS-3 Replacement-Synthetic Automatic Transmission Fluid
 - a. QuatraSyn-See attached data
 - b. Equivalent to or exceeds Allison TES-295 requirements
3. TS-5 Cummins Heavy Duty Natural Gas/LPG Engine Oil 15W-40 Specifications-See attached approval letters

Specifications	Pacemaker 1615	Citgard Natural Gas Engine Oil 15W-40
Sulfated Ash	.45	.55
TBN	5.4	5.2
TAN	.5	.8
Phosphorus	270	702
Zinc	330	778
Calcium	1300	1200
Copper Corrosion	NA	1A
Lead Increase	NA	<50
Tin Increase	NA	<20

See attached Product Information Sheets on the above CITGO products.


Roger Littlejohn
Technical Services Manager
CITGO Petroleum

Cummins Inc.
Box 3005
Columbus, Indiana
47202-3005



December 20, 2002

David Clark
CITGO Petroleum Corporation
P.O. Box 3758
Tulsa, Oklahoma 74102

Dear David,

CONFORMANCE TO CES 20074 ENGINE OIL SPECIFICATION

Results from tests according to CES 20074 have been presented to Cummins. In view of the results I would like to give the following comments.

The results have been found to be within the CES 20074 limits and hence oils formulated as stated in your request can be labeled as conformance to CES 20074.

The oils shall be used per the ambient temperature and SAE grade guidelines in the engine specific Operation and Maintenance (O & M) manual, as well as, in any Cummins service documents.

Please notify Cummins Inc. if the formulation of this product changes.

Brand Name: CITGARD NATURAL GAS 15W40
SAE Grade: 15W40

I hope this information will be of assistance to you.

Sincerely,

A handwritten signature in black ink, appearing to read 'W. A. Totten'.

Warren A. Totten
Fuels and Lubricants

DISCLAIMER: Product registration means the manufacturer or marketer has faithfully collected information pertinent to the requirements of the specification, and with the full intention to conform to the specification. However, it is still the responsibility of the manufacturer or marketer to ensure satisfactory performance of its products in all aspects at all times. Registration for CES 20074 does not waive product liability of the manufacturer or marketer. Cummins does not warrant the performance of non-Cummins products, registered or not.

Phone: 812-377-5000
Facsimile: 812-377-3334

Revision Date: February 25, 2002



Friday, June 20, 2003

Mr. David Clark
CITGO
4500 S. 129th E. Ave.
Tulsa, OK 74134

Dear Mr. Clark:

Subject: Applicability of Citgard Natural Gas SAE 15W-40 Engine Oil in
DDC Series 50G and S60G Engines

Thank you for providing information about the Citgard Natural Gas SAE 15W-40 Engine Oil product for use in natural gas fueled engines. Based upon the information provided, this engine oil has been formulated with OLOA 1255Z. Field testing with this additive technology in DDC engines has shown it to perform similarly to OLOA 1255, therefore oils formulated with OLOA 1255Z at 10.81 % mass treat rate in Group I and II base stocks with a non-dispersant viscosity index improver are acceptable for use in DDC Series 50G and Series 60G engines.

Thank you for providing the documentation for my review. Please contact me at 313-592-5970 should you have any questions.

Sincerely,

A handwritten signature in cursive script that reads "Mesfin Belay".

Mesfin Belay
Fuels and Lubricants

cc:
T. Bistue
D. Karineami
G. Lysinger
J. Reinhart
J. Zhu





April 26, 2000

Mr. Richard J. Patrick
Product Specialist
Citgo Petroleum
P.O. Box 3758
Tulsa, OK 74102-3758

Dear Dick

Subject: Citgo Pacemaker 1615 15W-40 for Detroit Diesel Corp. Series 50G engines

In response to your inquiry regarding the engine oil requirements for DDC Series 50G natural gas fueled engines and the possible use of Citgo Pacemaker 1615 15W-40. Since no industry performance category exists for identification of the proper engine oils for these engines DDC has adopted a list of recommended oils based on field experience and their performance in the engine during product development.

To accommodate the needs of transit customers other oils have been identified which use identical additive technology. Therefore oils formulated with OLOA 1255 at a 10.1% mass treatment rate have been accepted as alternates to the recommended products listed in DDC publication 7SE272. I have received written communication that Citgo Pacemaker 1615 15W-40 is formulated with OLOA 1255 at the prescribed treatment rate. Based upon this information, Pacemaker 1615 can be recommended for this service. I have recommended that customers confirm the chemical profile as:

Calcium - 1200 ppm, Phosphorous - 280ppm, Zinc - 303 ppm, and TBN (D2896) - 5.1

Should this information be inaccurate, please notify me as soon as possible. If you have any further comments or questions, do not hesitate to contact me.

Sincerely,

Danny E. Larkin
Fuels and Lubricants

/

cc:

Mobil 1 Synthetic ATF

Most Advanced Synthetic Automatic Transmission Fluid



Product Description

Mobil 1 Synthetic ATF is a synthetic fluid designed that meets the demanding requirements of modern passenger vehicles. The synthetic baseoil composition enables excellent performance even in the severest of operating conditions. It offers outstanding gear shifting and power transfer performance. Versus conventional ATF fluids, the inherently high viscosity index and stability of Mobil 1 Synthetic ATF protects against thermal breakdown at high operating temperatures, while still providing outstanding performance at ambient temperatures as low as -54° C.

Features & Benefits

Mobil 1 Synthetic ATF combines synthesised hydrocarbon base oils and a superior balanced additive system to provide significantly higher levels of performance above conventional fluids. This unique, advanced technology has demonstrated extended drain, long-term friction retention, and low-temperature capability. Further, it improves overall transmission durability and cleanliness. Key features and benefits include:

Features	Advantages and Potential Benefits
Enhanced, long-term frictional properties	Improves and extends transmission efficiency, smooth shifting performance and fuel economy
Exceptional thermal and oxidation stability	Keeps transmissions clean to extend life and performance even under severe driving conditions
Outstanding film-strength and anti-wear properties	Significant wear reduction and longer transmission life
Excellent low-temperature fluidity	Provides prompt and reliable lubrication at ambient temperatures down to -54° C
Exceptional shear stability	Viscosity retention even under the severest heavy duty, high temperature operating conditions
Compatible with mineral ATF fluids and all common seal materials	Reduced concern in top-off emergencies and excellent leakage control

Applications

- Mobil 1 Synthetic ATF is recommended for use in modern high performance automobiles, SUV's, SUT's, vans and other light trucks requiring Dexron III and Ford Mercon performance levels.
- Suitable for use in older vehicles which originally required Ford Type H and Type CJ fluids.
- Off-highway, heavy duty transmissions requiring Allison C-4, Caterpillar TO-2 performance
- Not recommended for Chrysler Type 7176 ATF.

Specifications & Approvals

Mobil 1 Synthetic ATF has the following builder approvals:	
Allison C-4	
Ford Mercon	
General Motors Dexron III	

Mobil 1 Synthetic ATF is recommended for use in	
---	--

applications requiring:	
Caterpillar TO-2	
Vickers 35VQ25 Vane Pump Test	
Sundstrand Piston Pump Test	

Typical Properties

Mobil 1 Synthetic ATF	
Viscosity, ASTM D 445	
cSt @ 40° C	34
cSt @ 100° C	7.6
Brookfield Viscosity, ASTM D 5293	
-cP @ -40° C	5190
Viscosity Index, ASTM D 2270	199
Pour Point, °C, ASTM D 97	-54
Flash Point, °C, ASTM D 92	236
Density @15° C kg/l, ASTM D 4052	a
Colour	Red

Health & Safety

Based on available information, this product is not expected to produce adverse effects on health when used for the intended application and the recommendations provided in the Material Safety Data Sheet (MSDS) are followed. MSDS's are available upon request through your sales contract office, or via the Internet. This product should not be used for purposes other than its intended use. If disposing of used product, take care to protect the environment.

The Mobil logotype, the Pegasus design and Mobil 1 ATF are trademarks of Exxon Mobil Corporation, or one of its subsidiaries

06-2003

Exxon Mobil Corporation
3225 Gallows Road
Fairfax, VA 22037
1-800-Mobil25 (662-4525)



Due to continual product research and development, the information contained herein is subject to change without notification. Typical Properties may vary slightly. This product data sheet is based on global product data sheets for use with products purchased in the U.S.
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TS-3
ALTERNATIVE



TranSynd™



Product Data Sheet

DESCRIPTION

TranSynd™ is a premium, synthetic, universal powershift and automatic transmission fluid. TranSynd™ is engineered to remain stable under the most severe conditions.

FEATURES AND BENEFITS

- Excellent thermal and oxidation stability resists deposit formation
- High viscosity index synthetic base fluids provide superior high/low temperature performance
- Excellent shear stability
- Excellent corrosion and foaming resistance
- Reduced used oil disposal costs
- Extended drain intervals
- Extended filter change intervals
- Compatible with most other automotive transmission fluids and seals
- One fluid for year-round use in all geographic locations

APPLICATION

The unique formulation of TranSynd™ can be used in a variety of applications:

- Inter/intracity buses
- Vans, school buses
- Refuse fleets
- Emergency vehicles
- Commercial vehicles and trucks
- Motorhomes
- On/Off-highway vehicles
- Light Duty Pickup Trucks and Passenger cars where DEXRON®-III is approved

In addition, TranSynd™ meets or exceeds the performance requirements set forth by OEMs and listed or approved under the following specifications:

- DEXRON®-III (G-34010)
- Allison TES-295 (AN-011001)
- Allison C-4 (27403598)
- Voith Transmission
- ZF Transmissions

HEALTH & SAFETY

Material Safety Data Sheets are available. These can be obtained from the address on this document.

CUSTOMER SERVICE AND SALES SUPPORT

Place order, order inquiry, Data sheets, MSDS, pricing

TYPICAL PROPERTIES

Viscosity, ASTM D-445, cSt @40°C (104°F)	38.9
@100°C (212°F)	7.3
Brookfield Viscosity, ASTM D-2983, cP@-40°C (-40°F)	8,400
Viscosity Index, ASTM D-2270	168
Specific Gravity, ASTM D-287, @ 16°C (60°F)	0.85
Flash Point, ASTM D-92, °C/°F	235/455
Fire Point, ASTM D-92, °C/°F	274/525
Pour Point, ASTM D-97, °C/°F	-55/-67
Total Acid Number, ASTM D-664, mg KOH/gm	1
4-Ball Wear, ASTM D-2266, 40kg, 1200 rpm, 1hr and 75°C (167°F), scar dia. Mm	0.44
NOACK Evaporative Loss, DIN 51581 1 hr, 150°C (302°F), wt%	0.62
Cold Cranking Simulator Viscosity, ASTM D-5293, cP @ -30°C (-22°F)	2,900

Revised: 10/13/03

Exxon XD-3 Monogrades

Premium Diesel Engine Oils



Product Description

Exxon XD-3 20, 30, 40 and 50 are premium diesel engine oils blended from high quality base oils and a balanced additive system to meet or exceed the lubrication protection requirements of American diesel engine builders. They are specifically formulated using a versatile blend of ashless dispersants, metallic detergents, and inhibitor chemistry to control oxidation, wear, corrosion and rust. Exxon XD-3 Monogrades are especially suited for two-cycle applications.

Features & Benefits

Modern diesel engines in moderate to heavy-duty applications place increasing demands on engine lubricants. The reliability built into Exxon XD-3 Monogrades deliver excellent protection, especially in 2-cycle designs, as well as older naturally aspirated models and gasoline engines. The key benefits include:

- Protects against oil thickening, high temperature deposits, and corrosion
- Effective TBN reserve to neutralize corrosive acids and control deposits
- Low sulfated ash content to minimize valve deposits extending valve life

Applications

- Diesel powered equipment from leading American manufacturers
- On-highway light and heavy-duty trucking
- Off-highway industries including: construction, mining, quarrying, and agriculture
- Two-cycle applications

Specifications & Approvals

Exxon XD-3 Monogrades meet the following industry specifications:	20	30	40	50
API CF	X	X	X	X
API CF-2		X	X	X

Exxon XD-3 Monogrades are recommended for use in applications requiring:	20	30	40	50
API SF	X	X	X	X

Typical Properties

Exxon XD-3 Monogrades	20	30	40	50
SAE Grade	20	30	40	50
Viscosity, ASTM D 445				
cSt @ 40°C	66	110	160	223
cSt @ 100°C	8.5	12.0	15.5	19.5
Viscosity Index, ASTM D 2270	98	98	98	99
Sulfated Ash, wt%, ASTM D 874	0.8	0.8	0.8	0.8
Total Base #, mg KOH/g,	7.3	7.3	7.3	7.3

ASTM:D:2896				
Pour Point, °C. ASTM D 97	-30	-30	-30	-27
Flash Point, °C, ASTM D 92	250	258	256	264
Density @ 15°C kg/l, ASTM D 4052	0.89	0.892	0.894	0.898

Health & Safety

Based on available information, this product is not expected to produce adverse effects on health when used for the intended application and the recommendations provided in the Material Safety Data Sheet (MSDS) are followed. MSDS's are available upon request through your sales contract office, or via the Internet. This product should not be used for purposes other than its intended use. If disposing of used product, take care to protect the environment.

The Exxon logotype, the Running Tiger, and XD-3 are trademarks of Exxon Mobil Corporation, or one of its subsidiaries.

03-2003

Exxon Mobil Corporation
 3225 Gallows Road
 Fairfax, VA 22037
 1-800-44Exxon (443-9966)

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TS-5 & TS-6

P R O D U C T I N F O R M A T I O N

CITGO PACEMAKER® GAS ENGINE OIL 1600 SERIES



Date 02/04

DESCRIPTION: CITGO Pacemaker® Gas Engine Oil 1600 Series oils are superior low ash, low phosphorus gas engine oils with a balanced advanced additive package to meet API CD quality performance and non-selective catalytic converter requirements. These new generation oils deliver a superior level of cleanliness — with excellent wear protection with a low ash formula that complies with manufacturers' warranties.

Formulated with the latest generation additives and highest quality base stocks available, CITGO Pacemaker® Gas Engine Oil 1600 Series oils are unsurpassed in performance.

- QUALITIES: • Contain special dispersants and detergents to insure a cleaner, longer running engine. • Control deposits and minimize wear of pistons, rings, and liners. • Retain TBN to neutralize combustion acids from sour gas. • Effectively control oxidation and nitration which create sludge that thickens the oil, plugs filters and causes excessive foaming. • Minimize valve recession to provide longer head life.

APPLICATIONS: CITGO Pacemaker® Gas Engine Oil 1600 Series oils are low ash oils suitable for a wide range of engines operating on virtually any variation of natural or synthetic gas, gas from digester or landfill sources or fuels containing low levels of sulfur and chlorofluorocarbons (CFC). Note: In high CFC/sour gas applications, an oil with a higher base reserve may be required.

These oils are recommended for high and medium speed 4-cycle engines manufactured by Caterpillar, Waukesha, Superior, Cooper-Bessemer; Cummins, Dresser-Rand (Categories I, II and III), as well as low-speed engines manufactured by Cooper-Bessemer and Worthington C4-Cycle.

CITGO Pacemaker® Gas Engine Oil 1640LP is a specially formulated SAE 40 grade product that exhibits superior low temperature properties, compared with other monograde oils. This low pour product is particularly well suited for applications where improved low temperature fluidity is needed, but a monograde oil is recommended by the engine manufacturer.

- CUSTOMER BENEFITS: • Cleaner pistons • Catalyst compatible • Minimum oil viscosity increase • Clean crankcases and top decks • Low wear • Reduced valve recession • Improved TBN retention

TS-5

P R O D U C T I N F O R M A T I O N

CITGO CITGARD® NATURAL GAS 15W40 ENGINE OIL



Date 02/04

DESCRIPTION: CITGARD® Natural Gas 15W40 Engine Oil is specially formulated for compressed natural gas (CNG) engines in transit operation. It is available as an SAE 15W-40 viscosity grade. Building on CITGO's long heritage of outstanding gas engine oils for stationary applications, CITGARD® NATURAL GAS 15W40 ENGINE OIL provides the protection needed in today's demanding mobile CNG applications.

QUALITIES: CITGARD® Natural Gas 15W40 Engine Oil is formulated with base stocks specially selected for compressed natural gas operation, proven additives and a shear stable VI improver. This unique combination provides protection against deposits in the higher temperature natural gas combustion chamber. Liner and tappet wear protection far exceed original equipment manufactures requirements. CITGO's combination of components provides excellent cold pumpability, foam protection, exceptional oxidation and nitration control, overall engine cleanliness, and reduced oil consumption.

APPLICATIONS: CITGARD® Natural Gas 15W40 Engine Oil exceeds the requirements for Cummins Engine Company CES 20074 and is recommended for Cummins L-10, "B" and "C" series CNG engines. CITGARD® NATURAL GAS 15W40 ENGINE OIL is recommended for applications of Detroit Diesel included in their 7SE272 publication, including Series 50G and 60G natural gas engines. Mack Trucks and John Deere also call for this quality of oil in their natural gas fueled engines. CITGARD® NATURAL GAS 15W40 ENGINE OIL is also suitable for use with other gaseous fuels such as liquefied natural gas and LPG. Always consult your owner's manual for correct oil recommendations.

TYPICAL PROPERTIES:

CITGARD® NATURAL GAS 15W40 ENGINE OIL

SAE Grade	15W-40
Material Code	632015001
API Service Category	CD
Gravity, ASTM D 4052, °API	29.5
Pounds Per Gallon	7.3
Flash Point, ASTM D92, °F, (°C)	437, (225)
Viscosity ASTM D445, cSt at 40°C	124
cSt at 100°C	15
Viscosity Index, ASTM D2270	125
Pour Point, ASTM D97, °F, (°C)	-17, (-27)
Sulfated Ash, ASTM D 872, %	0.56
Total Base Number, ASTM D2896	5.3

Color	Red	Red	Red
Gravity, API	29	29	34.5
Specific Gravity, 60 °F/60 °F	0.882	0.882	0.852
Pour Point, °C	-60 max	-60 max	-55 max
Flash Point, COC, °C	93 min	-	205 min
Flash Point, PMCC, °C	-	82 min	-
Acid Number, mg KOH/g	0.03 (0.2 max)	0.03 (0.2 max)	0.03 (0.1 max)
Barium Content, ppm	-	10 max (1)	10 max
Kinematic Viscosity, cSt			
@205 °C	-	-	1.1 (1.0 min)
@ 100 °C	5.1	5.1 (4.9 min)	3.5 (3.45 min)
@ 40 °C	13.9	13.9 (13.2 min)	14.1 (14.0 min)
@ -40 °C	460 (500 max)	460 (600 max)	2000 (2200 max)
@ -54 °C	1950	1950 (2500 max)	-
@ 130 °F	10.7 (10.0 min)	-	-
Viscosity Index	370	370	128
Low Temperature Stability			
72 hours at -54 °C	Pass	Pass	-
72 hours at -40 °C	-	-	Pass
Copper Corrosion, 72 hours at 135 °C	2e max	2e max	-
Oxidation Corrosion Stability 168 hours at 135 °C	Pass	Pass	Pass
Water Content, ppm	50 (100 max)	50 (100 max)	50 (100 max)
4-Ball Wear Scar, mm 1 hour, 1200 rpm, 75 °C, 40 kg	0.8 (1.0 max)	0.8 (1.0 max)	0.56 (0.65 max)
Evaporation Loss, wt %			
6 hours at 71 °C	15 (20 max)	15 (20 max)	-
6.5 hours at 205 °C	-	-	13 (20 max)
Particle Count			
5-15 microns		10000 max	10000 max
15-25 microns		1000 max	1000 max
25-50 microns		150 max	150 max
50-100 microns		20 max	20 max
100+ microns		5 max	5 max
Particulate		0.3 max	0.3 max

Contamination, mg/100 mL			
Filtration Time, minutes/100 mL		6 (15 max)	6 (15 max)
Foam, ASTM D892 Seq I, mL/mL	30/0 (65/0 max)	30/0 (65/0 max)	10/0 (65/0 max)
Nitrile Rubber L Swell, % 168 hours at 70 °C	19.0 to 30.0	19.0 to 30.0	18.0 to 30.0
Shear Stability, ASTM D 2603 Option B, % Loss in KV at 40 °C	15 max	15 max	-
Bulk Modulus, Isothermal Secant at 40 °C, 4,000 psig	200,000 min	200,000 min	-
Bulk Modulus, psi Isothermal Secant at 40 °C, 10,000 psig	-	-	200,000 min

Health & Safety

Based on available toxicological information, this product is not expected to produce adverse effects on health when used and handled properly. Information on use and handling, as well as health and safety information, can be found in the Material Safety Data Sheet (MSDS) which can be obtained from your local distributor or via the Internet on <http://www.exxonmobil.com/lubes>

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04-2003

Exxon Mobil Corporation
3225 Gallows Road
Fairfax, VA 22037-0001

<http://www.exxonmobil.com>

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ExxonMobil
Aviation Lubricants

Nuto H Series

Premium Quality Anti-wear Hydraulic Oils



Product Description

Exxon Nuto H Series oils are premium quality anti-wear hydraulic oils intended for industrial and mobile service applications where anti-wear lubricants are required. They are formulated with high quality base oils and a select additive system that results in products that provide many desirable features to improve and prolong equipment life. Nuto H Series oils are designed to provide good performance in a range of hydraulic components used in systems subjected to moderate to severe operating conditions. Their high level oxidation and chemical stability helps control deposit formation and reduces the potential for sluggish system operation and valve sticking. They provide long oil/filter life and optimum equipment protection reducing both maintenance and product disposal costs. They provide good protection against rust and corrosion in high humidity operations or where low levels of moisture are unavoidable. Nuto H Series oils separate water readily and have good air release properties. These products meet the performance requirements of a wide range of hydraulic system and component OEMs.

Features & Benefits

The Nuto H Series hydraulic oils help reduce the potential for wear and corrosion, particularly where water or moisture is present. Their excellent oxidation resistance and chemical stability allow extension of oil and filter change intervals. Their high level of anti-wear properties result in exceptional equipment performance that not only results in fewer breakdowns but helps improve production capacity. Their good demulsibility characteristics permit the oils to work well in systems contaminated with small amounts of water yet readily separate large amounts of water.

The Nuto H Series oils offer the following benefits:

- Excellent anti-wear performance reducing pump wear and leading to long pump life
- Reduction of sludge and deposit formation in close-tolerance components such as servo-valves
- High performance and smooth hydraulic operations derived from fast air release, very good foam control and good water separability
- Exceptional corrosion protection reduces the negative effects of moisture on system components
- Excellent filterability to prevent filter blockage even in the presence of water
- Effective oxidation and chemical stability characteristics allows extension of oil and filter life

Applications

- Systems employing gear, vane, radial and axial piston pumps where anti-wear hydraulic oils are recommended
- Hydraulic applications where contamination or leakage are unavoidable
- Where small amounts of water are unavoidable and this water could damage components
- Systems containing gears and bearings where mild anti-wear characteristics are required
- Systems requiring a high degree of load-carrying capability and anti-wear protection
- Applications where thin oil-film corrosion protection is an asset such as systems where small amounts of water exist
- Machines containing a wide range of components using various alloys in their designs

Specifications & Approvals

Meets or Exceeds the following industry specifications	Exxon Nuto H 10	Exxon Nuto H 15	Exxon Nuto H 22	Exxon Nuto H 32
AFNOR NF-E 48-690/1	X	X	X	X
AFNOR NF-E 48-603 HM	X	X	X	X
Denison HF-0				X
Vickers I-286-S				X
Vickers M-2950-S				X
DIN 51524 PART 2	X		X	X
ISO 11158 TYPE HM	X	X	X	X

Cincinnati Machine P-68				X
Cincinnati Machine P-70				
Cincinnati Machine P-69				
Meets or Exceeds the following industry specifications	Exxon Nuto H 46	Exxon Nuto H 68	Exxon Nuto H 100	Exxon Nuto H 150
AFNOR NF-E 48-690/1	X	X	X	X
AFNOR NF-E 48-603 HM	X	X	X	X
Denison HF-0	X	X	X	X
Vickers I-286-S	X	X		
Vickers M-2950-S	X	X		
DIN 51524 PART 2	X	X	X	
ISO 11158 TYPE HM	X	X	X	X
Cincinnati Machine P-68				
Cincinnati Machine P-70	X			
Cincinnati Machine P-69		X		

Has the following builder approvals	Exxon Nuto H 10	Exxon Nuto H 15	Exxon Nuto H 22	Exxon Nuto H 32
Denison HF-0				X
Cincinnati Machine				
P-68				x
P-69				
P-70				

Has the following builder approvals	Exxon Nuto H 46	Exxon Nuto H 68	Exxon Nuto H 100	Exxon Nuto H 150
Denison HF-0	X	X	X	
Cincinnati Machine				
P-68				
P-69		x		
P-70	x			

Typical Properties

Nuto H Series	Exxon Nuto H 10	Exxon Nuto H 15	EXXON Nuto H 22	Exxon Nuto H 32
ISO Viscosity Grade	10	15	22	32
Viscosity, ASTM D 445, cSt @ 40°C				
cSt @ 40°C	10	15	22	32
cSt @ 100°C	2.71	3.45	4.42	5.4
Viscosity Index, ASTM D 2270	97	96	105	104
Copper Strip Corrosion,	1A	1A	1A	1A

ASTM D 130				
Rust Characteristics, ASTM D 665B	Pass	Pass	Pass	Pass
Pour Point, °C, ASTM D 97	-36	-24	-24	-24
Flash Point, °C, ASTM D 92	170	182	206	212
Density 15°C, ASTM D 1298, kg/L	0.85			0.872
Demulsibility time (minutes) to 3ml emulsion;				
@ 54°C	15	10	15	15
@ 82°C	-	-	-	-
Nuto H Series	Exxon Nuto H 46	Exxon Nuto H 68	Exxon Nuto H 100	Exxon Nuto H 150
ISO Viscosity Grade	46	68	100	150
Viscosity, ASTM D 445, cSt @ 40°C				
cSt @ 40°C	46	68	100	150
cSt @ 100°C	6.7	8.5	11.1	14.6
Viscosity Index, ASTM D 2270	104	107	95	95
Copper Strip Corrosion, ASTM D 130	1A	1A	1A	1A
Rust Characteristics, ASTM D 665B	Pass	Pass	Pass	Pass
Pour Point, °C, ASTM D 97	-24	-18	-15	-18
Flash Point, °C, ASTM D 92	226	234	242	258
Density 15°C, ASTM D 1298, kg/L	0.876	0.882	0.884	0.887
Demulsibility time (minutes) to 3ml emulsion;				
@ 54°C	15	20	-	-
@ 82°C	-	-	10	5

Health & Safety

Based on available information, this product is not expected to produce adverse effects on health when used for the intended application and the recommendations provided in the Material Safety Data Sheet (MSDS) are followed. MSDS's are available upon request through your sales contract office, or via the Internet. This product should not be used for purposes other than its intended use. If disposing of used product, take care to protect the environment.

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Mobilube HD Plus 80W-90, 85W-140

Extra High Performance Commercial Gear Lubricants



Product Description

Mobilube HD Plus 80W-90 and 85W-140 are extra high performance commercial gear lubricants formulated from select base oils and an advanced additive system. These lubricants are engineered for performance in heavy-duty commercial transmissions, axles, and final drives where extreme pressures and shock loading are expected. They provide excellent chemical and thermal stability at elevated bulk oil temperatures, good performance at low temperatures, and have demonstrated good rust protection resulting from water contamination and wet conditions. They provide excellent performance where API GL-5 and MT-1 service is required.

Features & Benefits

Today's heavy equipment applications place higher performance demands on drive train lubricants. Higher speeds, higher torque, and heavier loads require improved formulations to maximise equipment life and optimise operating costs. Longer service intervals place additional demands on the gear lubricant. Mobilube HD Plus gear lubricants are engineered to meet these challenges. The key benefits include:

Features	Advantages and Potential Benefits
Excellent thermal stability and resistance to high temperature oxidation	Extended gear and bearing life due to minimal deposits and longer seal life
Good protection against low speed/high torque wear and against high speed scoring	Increased load carrying capability and reduced operating costs
Excellent rust, staining, and corrosion protection	Reduced wear and longer component life
Effective low temperature lubrication	Reduced wear and ease of start-up
Wide multipurpose capability	Reduced number of gear lubricants to simplify inventory and minimize misapplication
Good resistance to foaming	Maintains film strength for effective lubrication
Compatible with typical automotive seals and gaskets	Minimum leakage and reduced contamination

Applications

- Heavy-duty manual transmissions, axles, and final drives requiring API GL-5 and MT-1 level performance
- On-highway light and heavy-duty trucks, busses, vans, and cars
- Off-highway industries including: construction, mining, quarrying, and agriculture
- Other heavy-duty industrial and automotive applications involving hypoid and other gears operating under conditions where high speed/shock load, high speed/low torque, and/or low speed/high torque conditions prevail
- Mobilube HD Plus gear lubricants are intended for initial fill, top-off, and refill of enclosed commercial gearing in manual or semiautomatic transmissions where gear lubricants are recommended including drive axles and final drives
- Not recommended for applications requiring API GL-4 Level performance
- Not intended for transmissions for which engine oil or automatic transmission fluids are recommended

Specifications & Approvals

Mobilube HD Plus Gear Oil meets the following industry specifications:	80W-90	85W-140
API GL-5	X	X
API MT-1	X	X

Mobilube HD Plus Gear Oil has the following builder approvals:	80W-90	85W-140
Mack GO-J	X	X

Mobilube HD Plus Gear Oil has the following military specifications	80W-90	85W-140
MIL-PRF-2105E quality level	X	X

Typical Properties

Mobilube HD Plus		
SAE Grade	80W-90	85W-140
Viscosity, ASTM D 445		
cSt @ 40°C	139	333
cSt @ 100°C	14.5	25.4
Viscosity Index, ASTM D 2270	103	99
Pour Point, °C, ASTM D 97	-27	-18
Flash Point, °C, ASTM D 92	210	230
Density @ 15°C kg/l, ASTM D 4052	0.895	0.903

Health & Safety

Based on available information, this product is not expected to produce adverse effects on health when used for the intended application and the recommendations provided in the Material Safety Data Sheet (MSDS) are followed. MSDS's are available upon request through your sales contract office, or via the Internet. This product should not be used for purposes other than its intended use. If disposing of used product, take care to protect the environment.

The Mobil logotype, the Pegasus design, and Mobilube HD Plus are trademarks of Exxon Mobil Corporation, or one of its subsidiaries.

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Exxon Superflo 5W-20, 5W-30, 10W-30, 10W-40, 20W-50

High Quality Multi-grade Passenger Vehicle Engine Oils

**Product Description**

Exxon Superflo 5W-20, 5W-30, 10W-30, 10W-40, 20W-50 are high quality conventional engine oils, which meet the latest industry service fill standards required in today's gasoline and diesel automobile engines.

Features & Benefits

Exxon Superflo 5W-20, 5W-30, 10W-30, 10W-40, 20W-50 keep engines running reliably through a combination of high quality conventional mineral oils and a premium additive system. Exxon Superflo 5W-20, 5W-30, 10W-30, 10W-40, 20W-50 protect engines from build up of harmful deposits, sludge and varnish and friction fighting agents fight wear helping extend an engine's life for years of dependable service. Select grades, 5W-20, 5W-30, 10W-30 are specially formulated providing fuel savings benefits. Key features and benefits:

- Good overall consistent and dependable protection helps minimise cost of ownership
- Good thermal and oxidation stability prevents the formation of abrasive engine deposits, sludge and varnish.
- Friction fighting antiwear formulation system helps extend engine life and in ILSAC GF3 viscosity grades promotes fuel savings
- High viscosity index with shear stabilised viscosity modifiers provide consistent and dynamic protection for normal and high stress driving

Applications

Exxon Superflo 5W-20, 5W-30, 10W-30, 10W-40, 20W-50 are specifically recommended for use in all types of vehicles and driving conditions. Exxon Superflo 5W-20, 5W-30, 10W-30, 10W-40, 20W-50 are excellent choices for passenger cars, light trucks, SUVs and vans.

Specifications & Approvals

Exxon Superflo meets or exceeds the following industry specifications:	5W-20	5W-30	10W-30	10W-40	20W-50
API	SL,SJ	SL,SJ	SL,SJ	SL,SJ	SL,SJ
ILSAC	GF3	GF3	GF3		
Ford	M2C-153H				

Typical Properties

Exxon Superflo	5W-20	5W-30	10W-30	10W-40	20W-50
SAE Grade	5W-20	5W-30	10W-30	10W-40	20W-50
Viscosity, ASTM D 445					
cSt @ 40° C	47	62	70	96	172
cSt @ 100° C	8.3	10.4	10.4	14.1	19.0
Viscosity Index, ASTM D 2270	153	158	135	147	125
Sulfated Ash, wt%, ASTM D 874	0.87	0.74	0.74	0.74	0.74
HTHS Viscosity, mPas @ 150° C, ASTM D4683	A	3.1	3.1	3.7	4.8
Pour Point, °C, ASTM D 97	-30	-30	-33	-33	-21
Flash Point, °C, ASTM D 92	224	228	228	228	240

Density @15° C kg/l. ASTM D 4052	0.858	0.858	0.876	0.875	0.888
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Health & Safety

Based on available information, this product is not expected to produce adverse effects on health when used for the intended application and the recommendations provided in the Material Safety Data Sheet (MSDS) are followed. MSDS's are available upon request through your sales contract office, or via the Internet. This product should not be used for purposes other than its intended use. If disposing of used product, take care to protect the environment.

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P R O D U C T I N F O R M A T I O N



CITGO PREMIUM LITHIUM E.P. GREASES

Date 01/04

DESCRIPTION: CITGO Premium Lithium E.P. Greases are premium quality, lithium-12 greases containing extreme pressure, antiwear, antioxidant and anticorrosion additives. These greases are formulated with high quality base stocks. They do not contain molybdenum disulfide (moly).

CITGO Premium Lithium E.P. Greases are available in NLGI Grades 0, 1 and 2 and as a Semifluid.

BENEFITS: The smooth, buttery texture of the grease in conjunction with high quality mineral oil provides excellent pumpability over a wide temperature range. The extreme pressure agent provides the protection required to handle severe conditions characterized by high shock loads. Oxidation and corrosion inhibitors, and a high quality soap yield a product with excellent shear stability, load carrying properties, corrosion resistance and oxidation stability. The combination of these properties makes CITGO Premium Lithium E.P. Greases extremely versatile, thereby reducing the number of products required. Substantial reductions in storage and handling costs are possible with these universal products, while at the same time reducing potential of costly equipment failures associated with misapplication of product.

The service temperature range of these greases is 5°F to 250°F continuous, with peak intermittent temperatures up to 300°F.

APPLICATIONS: CITGO Premium Lithium E.P. Greases are recommended for the lubrication of both journal and anti-friction bearings in a wide variety of applications such as electric motors, gear couplings, metallurgical industry equipment and general industrial machinery.

CITGO Premium Lithium E.P. Greases are particularly adaptable for centralized lubrication systems and for bulk handling systems, both for bulk truck delivery and portable containers.

They are approved under Chrysler Specification MS-3701 and Cincinnati Machine P-64/P-72.

NLGI Grades 1 and 2 meet the ASTM D 4950 requirements for Chassis Grease Category LB and Wheel Bearing Grease Category GB. Cartridge labels will display the NLGI Certification Mark for Chassis Lubricant shown here.



TYPICAL PROPERTIES:

CITGO PREMIUM LITHIUM E.P. GREASES

Name NLGI Grade	Semi-Fluid 00-000	EP-0 0	EP-1 1	EP-2 2
Material Code	655771001	655210001	655211001	655212001
Soap	Lithium	Lithium	Lithium	Lithium
Texture	Buttery	Buttery	Buttery	Buttery
Color	Dark Amber	Dark Amber	Dark Amber	Dark Amber
Dropping Point, Min., ASTM D 566, °F (°C)	—	—	350 (177)	350 (177)
Penetration at 77°F, ASTM D 217				
Worked 60 strokes	425-455	355-385	310-340	265-295
Rust Prevention, ASTM D 1743	Pass	Pass	Pass	Pass
Copper Corrosion, ASTM D 4048	1b Max	1b Max	1b Max	1b Max
Timken OK Load, lbs.	40	40	40	40
Four-Ball EP, Weld, ASTM D 2596, Kgs	250	250	250	250
Oxidation Inhibitor	Yes	Yes	Yes	Yes
Base Fluid Viscosities				
Viscosity, ASTM D 445, cSt at 40°C	173	173	173	173
cSt at 100°C	14.9	14.9	14.9	14.9
ASTM D 2161, SUS at 100°F	914	914	915	915
SUS at 210°F	79	79	79	79
Viscosity Index	83	83	83	83



CITGO LITHOPLEX® GREASES

Date 01/04

DESCRIPTION: The CITGO Lithoplex® Grease family represents the latest technology in greases. All Lithoplex® greases contain extreme pressure (EP) additives. They are suitable for use at higher temperatures than conventional greases.

QUALITIES: CITGO Lithoplex® Greases of all grades and types are multipurpose greases incorporating the following characteristics:

Excellent Work Stability – Extremely stable lithium complex formula retains its consistency even in the most severe service.

Oxidation and Rust Resistance – Special additives protect machinery components from rust and corrosion, thereby extending equipment service life in the presence of moisture or high temperatures.

Extreme Pressure and Anti-Wear Protection – Additives provide excellent extreme pressure and anti-wear protection under severe conditions.

APPLICATIONS: **Lithoplex® MP** greases are compatible with conventional lithium soap greases. They contain extreme pressure (EP) additives and molybdenum disulfide (moly) to minimize wear in heavily-loaded components. These greases satisfy a wide range of industrial and automotive applications including bearings, ball joints and bushings. Three NLGI consistencies are available.

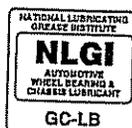
Lithoplex® CM greases contain moly – three percent – to meet equipment manufacturer's requirements. Polymer imparts an adhesive quality and provides improved water resistance. For severely shock-loaded components such as those found in construction and mining, the additional moly provides an extra margin of protection against wear. Applications include construction and mining equipment, fifth wheels, etc.

Lithoplex® HM greases are designed to provide excellent protection under extreme conditions and high-temperature applications. They contain five percent moly in addition to rust and corrosion inhibitors to protect machinery components, thereby extending equipment service life in the presence of moisture or high temperatures. Applications include construction and mining equipment, industrial equipment, fifth wheels, etc.

Lithoplex® RT greases were developed for applications where an especially tenacious grease is needed. Their red color and tacky, moly-free formula make them ideal for higher-temperature or problem applications. They are excellent for use in industrial equipment in which an adhesive grease is preferred.

Lithoplex® ST is a high-temperature grease offering exceptional water resistance, and is specifically designed to serve well in steel mill applications where equipment may be exposed to excessive amounts of water. It has a heavy base oil for good film protection, to accommodate shock loads, and to maintain consistency.

Lithoplex® MP 1, MP 2, RT 1 and RT 2 meet the ASTM D 4950 requirements for Wheel Bearing Grease Category GC and Chassis Grease Category LB. Labels display the NLGI Certification Mark for Automotive Wheel Bearing & Chassis Lubricant shown here.



TYPICAL PROPERTIES:

CITGO LITHOPLEX® GREASES

NLGI Grade	MP			CM		HM			RT		ST
	0	1	2	1	2	0	1	2	1	2	2
Material Code	655342001	655341001	655340001	655351001	655352001	655355001	655356001	655357	655343001	655344001	655367001
Color, appearance	Gray	Gray	Gray	Gray/Black	Gray/Black	Gray/Black	Gray/Black	Gray	Red	Red	Dark Green
Texture	Smooth	Smooth	Smooth	Adhesive	Adhesive	Tacky	Tacky	Stringy	Tacky	Tacky	Buttery
Penetration, ASTM D 217, 60 strokes	355-385	310-340	265-295	310-340	265-295	355-385	310-340	265-295	310-340	265-295	275-295
Four-Ball EP, Weld, ASTM D 2596, kgs.	315	315	315	400	400	500	500	500	250	250	500
Load Wear Index, Kgf	55	58	58	64	64	64	64	64	48	48	62
Four-Ball Wear, mm Scar, ASTM D 2266 40 kgs. load	0.50	0.45	0.45	0.40	0.45	0.45	0.40	0.40	0.42	0.42	0.40
Rust Prevention Test, ASTM D 1743	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
Water Resistance, 175°F, ASTM D 1264, % Loss	8.3	5.0	2.0	2.0	2.0	-	2.0	7.5 max.	5.3	2.0	1.4
Dropping Point, ASTM D 2265, °F	-	500	550	500	550	-	500	500	500	550	430
Base Fluid Viscosities											
cSt at 40°C	232	232	232	286	376	376	376	376	533	533	540
cSt at 100°C	17.7	17.7	17.7	21.9	26.1	26.1	26.1	-	37.4	37.4	30
Molybdenum Disulfide	0.5	0.5	0.5	3.0	3.0	5.0	5.0	5.0	-	-	-

INVITATION FOR BIDS

CONTRACT PROPOSAL NO.: 2004-879RTCC

AC TRANSIT DISTRICT
Purchasing Department
10626 International Blvd.
Oakland, CA 94603

Date: August 17, 2004

TITLE: LUBRICATION PRODUCTS

BIDS WILL BE OPENED at 10626 International Blvd. by 2 P.M. September 28, 2004

Sign the bid, put it in an envelope, and write the Contract Bid number and Title on the outside. Sign and return this page. Retain Bidder's Duplicate copy for your files.

DO NOT INCLUDE SALES OR EXCISE TAXES in Bid prices.

ALL BIDDERS COMPLETE THIS SECTION:

2004

Upon execution of a Contract Acceptance form, the undersigned agrees to furnish, subject to provisions on the reverse of this form, all articles or services within the dates specified, in the manner and at the prices stated, in accordance with the advertisement, specifications, proposal, special conditions and general conditions, all of which are made part of the contract proposal, when authorized by Purchase Order, Contract Order, or Letter of Agreement issued by the District.

Name under which business is conducted: _____

Business street address: _____ Telephone: _____

_____ City State Zip Code

IF SOLE OWNER, sign here:

I sign as sole owner of the business named above:

Signed _____ Typed Name _____

IF PARTNERSHIP OR JOINT VENTURE, sign here:

The undersigned certify that we are partners in the business (joint venture) named above and that we sign this contract proposal with full authority to do so (one or more partners sign):

Signed _____ Typed Name _____

Signed _____ Typed Name _____

IF CORPORATION, sign here:

The undersigned certify that they sign this contract proposal with full authority to do so:

Corporate Name: _____

Signed _____ Typed Name _____ Title _____

Signed _____ Typed Name _____ Title _____

Incorporated under the laws of the State of _____

GENERAL CONDITIONS, INSTRUCTIONS AND INFORMATION FOR BIDDERS

1. EXPLANATIONS, CLARIFICATIONS AND CHANGES

Bidders shall request any explanation, clarification or changes to specifications in writing. Any reply and/or change to specifications will be made by written addendum which shall become a part of the bid documents.

2. BID SUBMISSION

To receive consideration, bids must be delivered prior to the date and time for bid opening. All bids shall be in a sealed envelope properly endorsed as to the bid number and opening date. Submission of a bid shall constitute a firm offer to the District for ninety (90) days from the last day for receipt of bids.

Unauthorized conditions, limitations or provisos attached to a bid will render it non-responsive and may cause its rejection. No telegraphic or facsimile bids or modifications will be considered unless otherwise stated.

A bidder may withdraw his bid prior to bid opening, without prejudice, by submitting a written request for its withdrawal to the Purchasing Manager. The bidder must be able to identify its Bid, show proper identification, and show proper authorization to withdraw the Bid.

At the hour specified in the notice, the District will open, examine and publicly declare all bids received. Bidders, their representatives, and others interested, are invited to be present at the opening of bids. Awards will be made or bids rejected by the District within a reasonable time after bids have been opened.

3. APPROVED EQUALS

When the name of a manufacturer, brand or make, with or without a model number, is used in describing any item in this document, bids for similar articles will be considered unless otherwise stated. The District shall be the sole judge whether such alternate articles are acceptable. Unless the bidder states to the contrary, articles offered are assumed to be the specific articles named in this document and that articles offered are in accordance with the specifications. If not offering the specific articles named, bidder should enclose with bid full information, specifications and descriptive data on items offered. The District reserves the right to permit deviations from the specifications if any article offered is substantially in accord with the specifications and is deemed by the District to be as good quality and as fully satisfactory for its intended use as an article fully meeting specifications.

4. CONDITION OF ARTICLES

Articles offered and furnished must be new and previously unused and of manufacturer's latest model unless otherwise specified herein.

5. TAXES

The supplies, materials or equipment called for under the specifications will be used by the District in the performance of a governmental function and are exempt from taxation by the United States Government.

Unless otherwise stated bidder shall exclude applicable California State and local sales or use taxes in the total price in his bid. Said tax, wherever applicable, will be paid by the District to the Contractor, if licensed to collect same, or otherwise directly to the State.

6. AWARD AND REJECTION OF BIDS

The District may reject any and all bids, may waive any minor irregularities or informalties in any bid or in the bidding procedure, and must reject a bid of any party who has been delinquent or unfaithful in any former contract with the District. If an award is made, it shall be made to the lowest responsible bidder.

7. DELIVERIES

FOB destination in Oakland, freight prepaid and allowed. Unless otherwise stated in the specification or bid forms, bidder shall include freight or delivery charges in the total price in its proposal.

8. SEPARATE ITEMS OR IN THE AGGREGATE

Any bidder may bid separately for any item unless otherwise provided. The District may make awards on separate items or in an aggregate of several or all items unless otherwise provided.

9. CASH DISCOUNTS

Cash discount (discount for prompt payment) will be taken into consideration in determining the low bid under the following conditions:

- a. Discount period must be at least 30 days.

- b. The discount period will start on the date of completion of delivery of all items on any Purchase Order or other authorization or upon date of properly prepared invoices covering such deliveries, whichever is later.
- c. Payment is deemed to be made, for the purpose of claiming the discount, on the date of mailing the District's warrant or check.

10. ACCEPTANCE, BILLING AND PAYMENT

Acceptance by the District of any equipment, supplies, or materials furnished under the contract to be awarded shall occur only subsequent to the final inspection by authorized employees of the District. Defective or nonconforming equipment, supplies or materials shall be rejected by the District and the contract price adjusted accordingly unless acceptable replacement is made.

Invoices shall be rendered in triplicate to AC Transit District, P.O. Box 28507, Oakland, California 94604. Invoices shall include all applicable state, city and special district sales taxes at time of delivery. Invoices shall identify the Contract and Purchase Order Numbers. Unless otherwise stated, the District will make payment within thirty (30) days of the date of completion of delivery of all items on any Purchase Order or other authorization or upon date of properly prepared invoices covering such deliveries, whichever is later.

11. WARRANTY OF TITLE

The Contractor warrants and agrees that title to all materials and equipment furnished under this contract and accepted by the District will pass to the District free and clear of all liens, claims, security interests or encumbrances.

12. PERFORMANCE WARRANTY

Contractor shall supply his standard warranty(ies) on defects in workmanship and material applicable to the materials, supplies or equipment furnished hereunder. The standard warranties should be no less than the minimum requirements stated in the Specifications. All warranties to commence after acceptance of delivery by the District unless otherwise stated. It is understood and agreed that the District does not waive any warranty either expressed or implied or any liability of the manufacturer or contractor as may be determined by a decision of any court of the State of California or the United States.

13. INDEMNIFICATION

Contractor shall indemnify, keep and save harmless the District, its Board of Directors, officers, officials, employees, agents and volunteers from and against any and all liability, loss, damage, expense, costs (including, without limitation, costs and fees of litigation) of every nature arising out of or in connection with Contractor's performance of work hereunder or its failure to comply with any of its obligations contained in the Agreement, except such loss or damage caused by the sole negligence or willful misconduct of the District.

14. TERMINATION AND TERMINATION FOR CONVENIENCE

In the event the Contractor fails to perform any of his obligations under this contract, this contract may be terminated effective after 10 days written notice and all of contractor's rights hereunder ended. No new work will be undertaken and no new deliveries will be made after the date of receipt of such notice.

The District may terminate this Agreement for the District's convenience and without cause at any time by giving Contractor written notice of termination. In the event of termination, Contractor will be paid for those services performed or deliveries made pursuant to this Agreement to the satisfaction of the District up to the date of termination. In no event will the District be liable for costs incurred by Contractor after receipt of notice of termination.

15. NON-DISCRIMINATION

In connection with the execution of any contract hereunder, the Contractor shall not discriminate against any applicant or employee on the grounds of race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, marital status, sex or age as defined in Section 12926 Government Code.

16. GOVERNING LAW

This contract shall be governed by the laws of the State of California.

17. PROHIBITED INTERESTS

By submitting a bid, the bidder represents and warrants that neither the General Manager nor any Director, officer, employee of the District is in any manner interested directly or indirectly in the bid or in the contract which may be awarded under it, or in any expected profits to arise therefrom (State of California Government Code section 1090 et Seq.) No member, officer or employee of the District, during his/her tenure or for one year thereafter, shall have an interest, direct or indirect, in this Contract or the proceeds thereof.

LUBRICATION PRODUCTS
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18. SCOPE OF WORK/BID COMMENTS

The Alameda Contra-Costa Transit District, acting on behalf of the Regional Transit Coordinating Council Procurement Committee (RTCC), is soliciting bids for Lubrication Products. This contract provides for purchase and delivery of Lubrication Products to participating RTCC agencies, as specified in the Technical Specifications of this bid.

All bidders must provide each participating RTCC Agency with unit costs for each line item showing an estimated yearly usage of Lubrication Products on the BID FORMS.

Each participating RTCC Agency must have a bid to evaluate in the event that multiple awards are made.

19. TYPE OF CONTRACT

- A. This is a two (2) year, firm fixed price, indefinite quantity contract.
- B. The quantities listed are the estimated annual requirements based on current usage. The RTCC does not guarantee, either expressed or implied, to purchase these quantities, but the right is reserved to purchase any greater or lesser quantities. Seller shall be bound to the prices on the Bid Form for the duration of the Contract term.

20. TERM OF CONTRACT

- A. The contract with each RTCC Agency shall be for two (2) years. Bid prices shall be firm for the term of the Contract.
- B. The contract commencement date shall be three (3) days after execution of the written Contract or Purchase Order with each RTCC Agency. Notification of award shall be made to the successful bidder in writing by each RTCC Agency.
- C. The rights and obligations offered in the Contract shall be offered equally to all RTCC Agencies. Except for those provisions relating to the initial award of contract by the District to the lowest responsive, responsible bidder, all references to the District shall mean each RTCC Agency. Each RTCC Agency shall issue individual Contracts or Purchase Orders that shall specify quantity and delivery requirements and shall make payments directly to the Seller who agrees to look solely to such agency for compensation. Any termination or modification of contractual commitments, in whole or in part, with individual RTCC Agencies whether

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mutually agreed to or by remedy at law, shall in no way relieve the Seller of any such obligations to the remaining RTCC Agencies.

21. DELIVERY LOCATIONS

- Daytime delivery locations:
- AC Transit
Receiving Dock Central Maintenance Facility
10626 International Boulevard
Oakland, CA 94603

 - AC Transit
Emeryville, Division 2
1177 - 47th Street
Emeryville, CA 94608

 - AC Transit
Richmond, Division 3
2016 Mac Donald Avenue
Richmond, CA 94801

 - AC Transit
East Oakland, Division 4
1100 Seminary Avenue
Oakland, CA 94621

 - AC Transit
Hayward, Division 6
1728 Sabre Street
Hayward, CA 94545

 - Golden Gate Transit (GGT)
San Rafael
1011 Andersen Drive
San Rafael, CA 94901

 - Golden Gate Transit (GGT)
Novato
801 Golden Gate Place
Novato, CA 94947

 - Golden Gate Transit (GGT)
Santa Rosa
3225 Industrial Drive
Santa Rosa, CA 95401

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Golden Gate Transit (GGT)
350 - 8th Street
San Francisco, CA 94103

Santa Cruz Metropolitan Transit District
(SCMTD)
Maintenance Facility
138 Golf Club Drive
Santa Cruz, CA 95060

Santa Cruz Metropolitan Transit District
(SCMTD)
Operations Facility
1200 River Street
Santa Cruz, CA 95060

Santa Cruz Metropolitan Transit District
(SCMTD)
Maintenance Facility
111 Dubois Street
Santa Cruz, CA 95060

22. DELIVERY

Delivery of all items is required within three (3) days of placement of order.

23. BILLING AND INVOICING

Bidder/Seller shall render invoices in triplicate with purchase order numbers provided to participating RTCC Agencies billing addresses listed below:

AC Transit
P.O. Box 28507
Oakland, CA 94604

Golden Gate Bridge District (GGBD)
1011 Andersen Drive.
San Rafael, CA 94901

Santa Cruz Metropolitan Transit District
(SCMTD)
370 Encinal Street, Suite 100
Santa Cruz, CA 95060

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24. RESERVATION OF RIGHTS

The Invitation For Bids (IFB) does not commit AC Transit to award a contract, to pay any costs incurred in the preparation or presentation of a bid, or to procure or contract for services. AC Transit shall not be liable for any costs incurred by bidders in the preparation of bids or for any work performed in connection with bid preparation. AC Transit reserves the right, at its sole discretion, to reject any and all bids and/or to waive any minor informalities or irregularities in any bid or in the bidding process.

25. BIDDER'S/SELLER'S STATUS

Neither the Bidder/Seller nor any party contracting with the Bidder/Seller shall be deemed to be an agent or employee of the District. The Bidder/Seller is and shall be an independent contractor, and the legal relationship of any person performing work for the Bidder/Seller shall be one solely between said parties.

26. STATEMENT OF EXPERIENCE AND QUALIFICATIONS

- A. The Bidder/Seller may be required upon request of the District to prove to its satisfaction that the Bidder/Seller has the skill and experience and the necessary facilities and financial resources to perform the contract in a satisfactory manner and within the required time.
- B. A copy of the bidder's most recent Annual Financial Statement may be required.
- C. The District may reject the bid of any Bidder/Seller deemed not to possess the minimum qualifications to perform the work hereunder.

27. COORDINATION, INTERPRETATION AND EXAMINATION OF CONTRACT DOCUMENTS

- A. The General Conditions, Instructions and Information for Bidders, Special Conditions, Scope of Work, Technical Specifications and Performance Specifications and all supplementary documents are essential parts of the contract, and a requirement occurring in one is binding as though occurring in all. The documents are intended to be complementary and to provide for a complete work.
- B. In the event of inconsistencies between requirements contained in the different contract documents, the Scope of Work, Technical Specifications and Performance Specifications shall govern over the Special Conditions and General Conditions, Instructions and Information for Bidders. In case of inconsistencies between the Special Conditions and the General

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Conditions, Instructions and Information for Bidders, the Special Conditions shall take precedence.

- C. Should it appear that the Scope of Work, Technical Specifications or Performance Specifications are not sufficiently detailed or explained in the contract documents, the Bidder shall apply to the District in writing for such written explanations as may be necessary and shall conform to them as part of the Contract. In the event of any doubt or question arising respecting the true meaning of the contract documents, written clarification shall be sought from the District, which decision shall be final.
- D. The Bidder/Seller shall thoroughly examine all of the contract documents and determine the nature and location of the work, the general and local conditions and all other matters which can in any way affect the work under this Contract.

28. NON-COLLUSION AFFIDAVIT

By submitting a bid, the bidder shall represent and warrant that such bid is genuine and not sham or collusive or made in the interest or in behalf of any person not herein named, and that the bidder has not, directly or indirectly, induced or solicited any other bidder to put in a sham bid, or any other person, firm or corporation to refrain from bidding, and that the bidder has not in any manner sought by collusion to secure to the bidder an advantage over any other bidder.

29. PENALTY FOR COLLUSION

If at any time it shall be found that the person, firm or corporation to whom a contract has been awarded has, in presenting any bid or bids colluded with any other party or parties, then the contract so awarded shall be null and void and the Contractor and his bondsmen shall be liable to the District for all loss or damage which the District may suffer thereby and the Board of Directors may advertise for a new contract for said labor, supplies, materials or equipment.

30. CHANGES BY BIDDER/SELLER

If the Bidder/Seller, on account of conditions developing during the performance of the contract, finds it impracticable to comply strictly with these Technical Specification and applies in writing for a modification of requirements, such change may be authorized only in writing by the District, if not detrimental to the District and if without additional cost to the District.

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31. CHANGES BY DISTRICT

- A. In case work, materials or equipment shall be required which are not mentioned, specified or indicated or otherwise provided for herein, the Contractor shall, if ordered in writing by the District, do and perform such work and furnish such materials or equipment at the Bidder's catalog prices, less discounts ordinarily allowed to users of such materials or equipment or at regular labor charges less customary discount, or both.
- B. In case any work, materials or equipment which are mentioned, specified or indicated or otherwise provided for in the contract or in the specifications forming a part of the contract shall be required to be omitted from, in or about the work, the Bidder/Seller shall, if ordered by the District, omit the performance of such work and the furnishing of such materials or equipment. A deduction shall be made from the amount to be paid to the Bidder/Seller in an amount which the District and Contractor shall determine and mutually agree to be the reasonable value of such work, materials or equipment, and such determination and agreement shall be final and conclusive upon the Bidder/Seller.
- C. It is understood, however, that the amount of work, materials or equipment required by the Contract shall not, in accordance with the above provisions referring to additions and omissions, be increased or diminished so as to substantially alter the general character or extent of the contract.

32. INSURANCE

It is strongly recommended that bidders confer with their respective insurance carriers and/or brokers to determine in advance of bid submission the availability of insurance, Certificates and Endorsements as prescribed and provided herein. If an apparent low bidder fails to comply strictly with the insurance requirements, that bidder may be disqualified from award of the contract. Bidder/Seller shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages for property which may arise from or in connection with the performance of the work hereunder by the Bidder/Seller, bidder's/seller's agents, representatives, employees or subcontractors. The District reserves the right to alter, amend, increase or otherwise modify the insurance requirements stated herein.

- A. Minimum Scope of Insurance

Coverage shall be least as broad as:

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1. General Liability: Coverage is to be equal to Insurance Services Office Commercial General Liability Occurrence Form CG 0001.
2. Automotive Liability: Coverage should be equal to Insurance Services Office Business Auto Form CA 0001 (01/87) covering Automobile Liability, code1 (any auto).
3. Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

B. Minimum Limits of Insurance

Bidder/Seller shall maintain no less than:

1. General Liability - \$1,000,000 combined single limit per occurrence for bodily injury, personal injury, and property damage. If an aggregate limit is used, either a separate aggregate limit shall apply to this project/location or the aggregate limit shall be twice the required occurrence limit.
2. Automobile Liability - \$1,000,000 combined single limit per accident for bodily injury and property damage.
3. Workers' Compensation: Workers' Compensation limits as required by the State of California and Employer's Liability limits of \$1,000,000 per accident for bodily injury or disease.

C. Deductible and/or Self-Insured Retention

Any deductibles and/or self-insured retention must be declared to and approved by the District. The District reserves the option to: 1) Require the insurer to reduce or eliminate such deductibles and self-insured retention as to the District, and/or: 2) Require the Bidder to procure a bond guaranteeing the payment of any deductible or self-insured retention of losses, related investigations, claims, administration, and defense expenses.

D. Other Insurance Provisions

The policies are to contain, or are to be endorsed to contain, the following provisions:

1. General Liability and Automotive Liability policies:

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- a. The District, its officers, officials, or employees are to be covered as insured as respects: liability arising out of activities performed by on behalf of the Bidder/Seller; products and completed operations of the Bidder/Seller; premises owned, occupied or used by the Proposer. The coverage shall contain no special limitation on the scope of protection afforded to the District, its officers, officials, or employees.
 - b. For any claims related to this agreement, the Bidder's/Seller's insurance coverage shall be primary insurance as respects the District, its officers, officials, and employees. Any insurance or self-insurance maintained by the District, its officers, officials, or employees shall be in excess of the Proposer's insurance and shall not contribute with it.
 - c. Any failure with reporting provisions of the policies including breaches of warranties, shall not affect coverage provided to the District, its officers, officials, or employees.
 - d. The Bidder's/Seller's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurers liability.
2. Workers' Compensation and Employers Liability
- The insurer shall agree to waive all rights of subrogation against the District, its officers, officials, or employees, for losses arising from work performed by the Bidder/Seller for the District.
3. All Coverage
- a. Each policy required shall be endorsed to state that the coverage shall not be suspended, voided, canceled by either party, reduced in coverage or limits except after 30 days prior written notice by certified mail, return receipt requested, has been given to the District addressed to Risk Manager, Alameda-Contra Costa Transit District, 1600 Franklin Street, Oakland, California 94612.
 - b. Each policy is to be on an "Occurrence" form. "Claims Made" form requires prior approval by the District as well as Bidder/Seller being required to provide acceptable evidence of the policy's retroactive date, and will be also required to maintain the coverage with the same retroactive date for a

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period of not less than five (5) years following termination of services under the agreement. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a "retro date" prior to the contract effective date, the contractor must purchase "extended reporting" coverage for a minimum of five (5) years after completion of contract work.

4. Acceptability of Insurance

Insurance is to be placed with insurers with a current A.M. Best rating of no less than "A : VII".

5. Verification of Coverage

Bidder/Seller shall furnish the District with appropriate Certificates of Insurance and with original Endorsements effecting coverage required. The Certificates and Endorsements are to be signed by a person authorized by the insurer to bind coverage. The Certifications and Endorsements are to be received and approved by the District prior to the commencement of any work under the Agreement. The District reserves the right to require complete, certified copies of all required insurance policies at any time.

6. Other Requirements

- a. Should any work under this Agreement be sublet, the Bidder/Seller shall require each subcontractor of any tier to comply with all of the Agreement's insurance provisions and provide proof of such compliance to the District.
- b. These insurance requirements are not intended to and shall not in any manner limit or otherwise qualify the liabilities and obligations otherwise assumed by the Bidder/Seller under this Agreement, including but not limited to the provisions concerning indemnification.
- c. Compliance with these insurance requirements is considered a material part of the Agreement, and breach of any provision may, at the option of the District, be considered a material breach of the Agreement and result in action by the District to withhold payment and/or terminate the Agreement.

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33. DAMAGES

All loss or damage arising from any unforeseen obstruction or difficulties, either natural or artificial, which may be encountered in the prosecution of the work, or the furnishing of the supplies, materials or equipment, or from any action of the elements prior to the final acceptance of the work, or of the supplies, materials or equipment, or from any act or omission not authorized by these specifications or the part of the Bidder/Seller or any agent or person employed by it, shall be sustained by the Bidder/Seller.

34. DEFECTIVE OR DAMAGED WORK

Any material or equipment found to be damaged or defective at the time of delivery shall be repaired, replaced or corrected by the Bidder/Seller hereunder without additional cost to the District.

If the Bidder/Seller shall fail to comply promptly with any order of the District to repair, replace or correct damaged or defective work, then the District shall, upon written notice to the Contractor, have the authority to deduct the cost thereof from any compensation due or to become due the Bidder/Seller. Nothing in this section shall limit or restrict the provisions of the performance warranty as set forth in the General Conditions Instructions and Information for Bidders/Sellers.

35. ASSIGNMENT AND SUBCONTRACTING

The Bidder/Seller shall not assign, transfer, convey, subcontract or otherwise dispose of the Bidder/Seller or any part of it without obtaining in advance the written consent of the District.

36. PROTEST PROCEDURES

Protest Before Bid Opening

A. Protests based upon restrictive specifications or alleged improprieties in the bidding procedure shall be filed, in writing, with the Procurement and Materials Director, ten (10) days prior to the bid opening date. The protest must clearly specify the grounds on which the protest is based and include any supporting information.

B. Protest of Award

A Bidder/Seller (or other interested party as defined under the District's Protest Procedures) may file a protest with the District alleging a violation of applicable federal or state law and/or District policy or procedure relative to the seeking, evaluating and/or awarding of a procurement

LUBRICATION PRODUCTS
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contract. Such protest must be filed no later than ten (10) days after the date of notice of award or non-award of the contract by the District.

Copies of the District's Procurement Protest Procedures should be obtained from the District's Procurement and Materials Director. The Procurement Protest Procedures will be provided immediately upon request. FAILURE TO COMPLY WITH ANY OF THE REQUIREMENTS SET FORTH IN THE DISTRICT'S WRITTEN BID PROTEST PROCEDURES MAY RESULT IN REJECTION OF THE PROTEST.

37. CORRESPONDENCE

All correspondence must show **Contract Bid Number 2004-879RTCC**.

38. COST AND PRICING DATA

In the event there is only bid, cost and pricing data shall be submitted to the District by the bidder.

39. DRUM REMOVAL

It is the contractor's responsibility to pick up empty drums with secured bungs, per Department of Transportation regulations, at the time of delivery of a new shipment. Failure to do so may subject supplier to a \$1.00 per drum per day storage charge taken as a credit against invoices.

40. BRAND NAME AND PRODUCTS

- A. Whenever brand, manufacturer or product names are indicated in these specifications, they are included only for the purpose of establishing identification and a general description of the items. Wherever such names appear, the term "or approved equal" is considered to follow.
- B. Specifying a brand name, components and/or equipment in this specification shall not relieve the supplier from their responsibility to produce the product in accordance with the warranty and contractual requirements. The supplier is responsible for notifying the authority of any inappropriate brand names, component and/or equipment that may be called for in the specification, and to propose a suitable substitute or consideration.
- C. If your product brand is not listed in paragraph 1, **QUALIFIED PRODUCTS**, of this IFB's Technical Specifications, contact Stuart Hoffman, Technical Services, at (510) 577-8853 or Bob Bithell, Technical Services Manager, at (510) 577-8874, for product brand consideration as an approved equal.

LUBRICATION PRODUCTS
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Upon approval of your product brand, it will be the responsibility of the Bidder/Seller to obtain a written acknowledgement from the District's Technical Services Department and forward it to Al DeNurra, Senior Buyer, Purchasing Department, stating your product brand is an approved equal.

41. VENDOR REGISTRATION

If you are not already an AC Transit registered vendor, an online Vendor Registration is required prior to contract award. Bidders should access www.actransit.org, select purchasing, online purchasing, and register as an Online Purchasing User. To complete the process, include a W-9, Request for Taxpayer Identification Number and Certification - containing original signature - in proposals. If online access is not available, contact the Purchasing Department for instructions.

42. FURTHER INFORMATION

Prospective bidders may contact Al DeNurra, (510) 577-8809, between the hours of 7:00 a.m. and 3:30 p.m., Monday through Friday, holidays excepted, for further information. Any technical questions should be directed to Mr. Bob Bithell, Technical Services Administrator, (510) 577-8874 or Stuart Hoffman, Technical Services Supervisor, at (510) 577-8853.

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LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

TECHNICAL SPECIFICATIONS

1. **QUALIFIED PRODUCTS**

The following listed lubrication brands and manufacturers have been approved for purchase by all participating RTCC Agencies. Any Bidder/Seller submitting quotations for this IFB must supply lubrication products from these brands only.

BRAND
Arco
Benke Lubricants
Chevron
Citgo
Exxon
Minuteman Lubricants
Mobil
Pennzoil
Shell
Texaco
Unocal

2. **EXPERIENCE AND QUALIFICATIONS**

Any Bidder/Seller submitting quotations for this IFB must provide technical assistance and technical expertise regarding any product furnished under this contract. The Bidder/Seller may be required, upon request, to prove that it has the skill, experience and expertise as well as the necessary facilities and ample financial resources to perform the contract in a satisfactory manner and within the required time. The adequacy of such proof shall be determined by the RTCC.

3. **RESPONSIBILITY**

The Bidder/Seller shall furnish information for materials which require added safety precautionary instructions as they relate to their handling and safe storage. Hazardous types of materials included in this category are toxic, flammable, and non-flammable materials, etc. The Bidder/Seller shall furnish Material Safety Data Sheets (MSDS) prior to shipment.

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LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

TECHNICAL SPECIFICATIONS

A technical specification designation with number(s) (TS – x, or TS- xx) and descriptions reference the lubricant products in the below table.

TS-1	AUTOMATIC TRANSMISSION FLUID, (MINERAL BASE)
TS-2	SYNTHETIC AUTOMATIC TRANSMISSION FLUID
TS-3	SYNTHETIC AUTOMATIC TRANSMISSION FLUID, (TES-295 APPROVAL)
TS-4	HEAVY DUTY DIESEL ENGINE OIL 30W & 40W ENGINE OIL REQUIREMENTS
TS-5	CUMMINS HEAVY DUTY NATURAL GAS/ LPG ENGINE OIL 15W-40 ENGINE OIL REQUIREMENTS
TS-6	DETROIT DIESEL APPROVED HEAVY DUTY 15W-40 CNG ENGINE OILS
TS-7	AVIATION HYDRAULIC FLUID
TS-8	ISO 46 HYDRAULIC OIL
TS-9	HEAVY DUTY GEAR OIL, SAE 85W-140
TS-10	GASOLINE ENGINE MULTIGRADE ENGINE OIL 5W-30
TS-11	CHASSIS LUBRICANT
TS-12	WHEEL BEARING GREASE

LUBRICATION PRODUCTS
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TECHNICAL SPECIFICATIONS

TS-1

Automatic Transmission Fluid, (Mineral Base)

Automatic transmission fluids must meet or exceed GM Dexron III oil requirements. All bidders must provide documents that provide a valid GM Dexron III license number and Voith approval number for the product offered. In addition the Dexron III fluid must also meet or exceed the manufacturer's performance requirements for Allison C-4 and Voith transmissions. Proof of authenticity documents must be supplied from the vendor providing all approval numbers.

Applications: Heavy duty and automotive automatic transmissions

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TECHNICAL SPECIFICATIONS

TS-2

Synthetic Automatic Transmission Fluid

Synthetic automatic transmission fluids must meet or exceed GM Dexron III oil requirements. All bidders must provide documents that provide a valid GM Dexron III license number and Voith approval number for the product offered. In addition the Dexron III fluid must also meet or exceed the manufacturer's performance requirements for Allison C-4 and Voith transmissions. Proof of authenticity documents must be supplied by the vender providing all approval numbers.

Applications: Heavy duty and automotive automatic transmissions

LUBRICATION PRODUCTS
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TECHNICAL SPECIFICATIONS

TS-3

Synthetic Automatic Transmission Fluid, (TES-295 Approval)

Synthetic automatic transmission fluids must be approved for Allison specification for severe duty and extended drain intervals (TES-295). All bidders must provide documents that provide a valid GM Dexron III license number, Allison C4 approval number, and Voith approval number for the product offered. In addition the Dexron III fluid must also meet or exceed the manufacturer's performance requirements for Allison C-4 and Voith transmissions. Proof of authenticity documents must be supplied from the vender for all approval numbers.

Applications: Heavy duty and automotive automatic transmissions

LUBRICATION PRODUCTS
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TECHNICAL SPECIFICATIONS

TS-4

Heavy Duty Diesel Engine Oil 30W & 40W Engine Oil Requirements

	30W Engine Oil	40W Engine Oil
API Classification	CF-2	CF-2
Sulfated Ash, % mass (ASTM D 874)	1.0 % Max.	1.0 % Max.
Alkalinity (ASTM D2896)	7.0 min.	7.0 min.
Viscosity Index	95	95
Pour Point C, Max	-18	-15
Flash Point C, Min	220	225
Total Base Number (ASTM D 2896)	7.0 –10.0	7.0 –10.0
Zinc, ppm	Above 700	Above 700
Phosphorous, ppm	700 ppm min.	700 ppm min.

All oils must be properly refined to meet the above specifications. All testing is to be performed in accordance with applicable ASTM and SAE procedures.

To assure quality of engine oil in bulk quantities, all bidders must demonstrate they follow API Recommended Practice 1525 for handling bulk engine oils.

All deliveries will require a control sample to which future shipments can be compared.

Applications: Heavy duty diesel engines

LUBRICATION PRODUCTS
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TECHNICAL SPECIFICATIONS

TS-5

CUMMINS HEAVY DUTY NATURAL GAS / LPG ENGINE OIL 15W-40 ENGINE
OIL REQUIREMENTS

Specification	Cummins L-10G	Cummins B5.9G/LPG
Sulfated Ash (ASTM D874)	Less than 0.5% Mass	Between 0.4-0.6% Mass
TBN (ASTM D2896)	Between 5.0 and 5.5	More than 4.5
TAN (ASTM D664)	Between 0.5 and 0.7	Between 0.5 and 1.5
Phosphorous	250-350 PPM	650-850 PPM
Zinc	250-350 PPM	700-900 PPM
Calcium	900-1300 PPM	900-1300 PPM
Copper Corrosion (ASTM D130)	N/A	Less than 3
Lead Increase (ASTM D5968)	N/A	Less than 120 PPM
Tin Increase	N/A	Less than 50 PPM

LUBRICATION PRODUCTS
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TECHNICAL SPECIFICATIONS

TS-6

DETROIT DIESEL APPROVED HEAVY DUTY 15W-40 CNG ENGINE OILS

Oil Company	Product Name
Mobil Oil Company	Delvac Super GEO 15W-40
Exxon Company	Busgard GEO 15W40 Ester Super
Union 76 Products Company	76 Triton 5005 GEO 76 Firebird 5005 GEO 76 Triton VGEO
Citgo Petroleum Corporation	Pacemaker 1615
Pennzoil Products Company	Pennzoil GEO XHD 15W-40
Benke Lubricants	JAX Premium CNG Oil
Texaco Lubricants	Geotex LA 15W-40
Chevron Products Company	Chevron HDAX RPM 15W-40
Minuteman Lubricants – Agip	Agip Gas Engine Oil 15W-40
Shell International	Rimula

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

TECHNICAL SPECIFICATIONS

TS-7

Aviation Hydraulic Fluid

The Aviation Hydraulic Fluid supplied shall meet or exceed U.S. Mil Spec H-5606G. Fluid must be suitable for use as required by Lift-U Lift and Ricon Lift.

Application: Wheelchair lifts

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

TECHNICAL SPECIFICATIONS

TS-8

ISO 46 Hydraulic Oil

Hydraulic oil must meet or exceed Denison HF-O, Vickers M-2950-S, and DIN 51524 Part 2 approvals and recommendations.

Application: Van Hool transit coach hydraulic systems.

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

TECHNICAL SPECIFICATIONS

TS-9

HEAVY DUTY GEAR OIL, SAE 85W – 140

The gear oil supplied for this application shall be of the extreme pressure, multi-grade type. This gear oil shall meet API Service Codes MT-1 and GL-5.

Applications: Differentials

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

TECHNICAL SPECIFICATIONS

TS-10

Gasoline Engine Multigrade Engine Oil 5W-30

The motor oil supplied for this application shall meet the requirements for API code SL 5W-30.

Applications: Non-revenue automotive applications. New Flyer fan drive systems.

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

TECHNICAL SPECIFICATIONS

TS-11

Chassis Lubricant

All chassis lubricant supplied for this procurement shall be of the National Lubrication & Grease Institute (N.L.G.I.) certification category "LB" or approved equal as established in ASTM D 4950 automotive grease standards.

Application: Chassis lubrication

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

TECHNICAL SPECIFICATIONS

TS-12

Wheel Bearing Grease

All wheel bearing lubricants supplied for this procurement shall be of the N.L.G.I. certification category "GC" or approved equal as established in ASTM D 4950 automotive grease standards.

Application: Wheel bearings.

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

TECHNICAL SPECIFICATIONS

Description of National Lubrication Grease Institute

In the past, the diversity of specifications for automotive service greases, as established by the original equipment manufacturer (OEM), made it difficult for the marketer of lubricating greases to make available all the many specified products. Finally, the Society of Automotive Engineers, the American Society for Testing and Materials and NLGI, forming a tripartite group, all played their respective roles in establishing ASTM D 4950 as a standard for automotive service greases. As a result, OEM's, suppliers and consumers have a common language to use when describing lubricating greases for automotive service.

ASTM D 4950 includes specifications for two category groups: chassis lubricants (letter "L" prefix) and wheel bearing lubricants (letter "G" prefix). Performance classifications within these groups result in two letter designations for chassis greases (LA and LB) and three for wheel bearing greases (GA, GB, and GC) The automotive industry is in general agreement that the highest performance category, to date, in each group (LB and GC) is suitable for service re-lubrication.

Following the development of these categories, the Institute implemented its NLGI service classification as a means of identifying to the consumer the two highest performance levels: GC and LB; the combination, GC-LB, represents a multi-purpose category. In the future, NLGI will revise the system concurrently with any changes made to ASTM D 4950.

To facilitate easy, accurate identification to all users, NLGI has made available to the industry an identifying symbol, i.e., the NLGI Certification Mark, to be displayed on grease packaging. Those OEM owner's manuals that illustrate this mark will advise users to use only those greases carrying this mark on the label.

The license to use the NLGI Certification Mark is available to both NLGI members and non-members. Further information on the application procedure can be obtained from NLGI.

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

TECHNICAL SPECIFICATIONS

History and Procedure

National Lubricating Grease Institute Certification Mark History: It has long been recognized that the diversity of specifications for Automotive Service Greases, established by the Original Equipment Manufacturer (O.E.M), have made it difficult, if not impossible, for the marketer of lubricating greases to make available all the many specified products. With the issuance of ASTM D 4950 Standard Classification and Specification for Automotive Service Grease, it became not only possible but convenient to offer the products needed to provide proper service of automotive equipment. ASTM D 4950 includes specifications for two Category Groups: chassis lubricants (letter designation L) and wheel bearing lubricants (letter designation G). Performance Classifications within these Groups result in two letter designations for chassis greases (LA and LB), and three for wheel bearing greases (GA, GB, and GC). The automotive industry is in general agreement that the highest performance classification, to date, in each group (LB and GC) is suitable for service re-lubrication.

To facilitate communicating this information to users, NLGI has developed an identifying symbol, i.e., the NLGI Certification Mark. The OEMs Owner's Manuals, most of which refer to this Mark, advise users to use those greases carrying this Mark on the label. It is, therefore, advantageous for marketers of automotive grease to incorporate the Mark into their product label.

Since only the highest performance classification is acceptable to O.E.M's, only products meeting LB and GC standards are authorized to use the Mark. Should any future changes occur in ASTM 4950, NLGI will similarly revise its highest performance classifications for the Mark. Below are three versions of the Mark:

Who should apply? Ideally, application should be made by the copyright owner of a brand name, but other authorized users of a brand name may apply if the owner does not. If the owner does apply, other users of the brand name need not. (See "Products" Definition.)

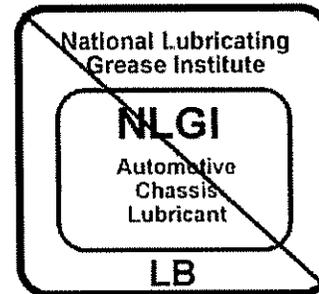
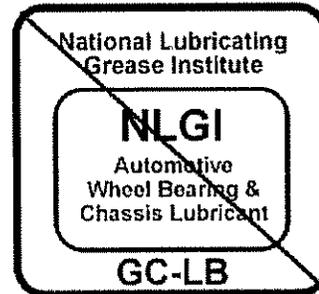
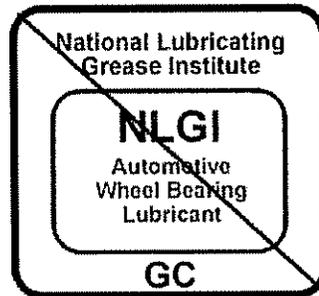
Procedure for Application: Provide one copy each of NLGI Forms A and Q plus two copies of Form C. Send to NLGI Headquarters with the non-refundable Application Fee. This Application Fee opens and maintains the file for each company. NLGI members pay the Application Fee whenever an Application Form is submitted; non-members pay the Application Fee annually. (See Fee Schedule.)

NLGI will review the Application and Qualification statements, and, assuming acceptance, will advise the applicant and request payment of the Certification Mark User Fee. (See Fee Schedule.)

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

TECHNICAL SPECIFICATIONS

Upon receipt of the Certification Mark User Fee, NLGI will return to the applicant an executed copy of the Certification Mark User Agreement, and camera-ready, reproducible proofs of the Mark. The Certification Mark User Fee extends for one year from date of approval.



LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

BID FORM

Estimated yearly usage of Lubricant Products

AC Transit

	TS-1	TS-2	TS-3	TS-4	TS-5	TS-6	TS-7	TS-8	TS-9	TS-10	TS-11	TS-12
Bulk Quantities	7500gl	3750gl	3750gl									
Unit cost	x	x	x									
Totals	\$	\$	\$									
Drum (55 gl) rate	2750gl						6820gl	385gl		880gl		
Barrel (per lb) rate									21,600lb		2800lb	
Unit cost	x						x	x	x	x	x	
Totals	\$						\$	\$	\$	\$	\$	

- TS-1 AUTOMATIC TRANSMISSION FLUID, (MINERAL BASE)
- TS-2 SYNTHETIC AUTOMATIC TRANSMISSION FLUID
- TS-3 SYNTHETIC AUTOMATIC TRANSMISSION FLUID, (TES-295 APPROVAL)
- TS-4 HEAVY DUTY DIESEL ENGINE OIL 30W & 40W ENGINE OIL REQUIREMENTS
- TS-5 CUMMINS HEAVY DUTY NATURAL GAS/ LPG ENGINE OIL 15W-40 ENGINE OIL REQUIREMENTS
- TS-6 DETROIT DIESEL APPROVED HEAVY DUTY 15W-40 CNG ENGINE OILS
- TS-7 AVIATION HYDRAULIC FLUID
- TS-8 ISO 46 HYDRAULIC OIL
- TS-9 HEAVY DUTY GEAR OIL, SAE 85W-140
- TS-10 GASOLINE ENGINE MULTIGRADE ENGINE OIL 5W-30
- TS-11 CHASSIS LUBRICANT
- TS-12 WHEEL BEARING GREASE

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

BID FORM

Estimated yearly usage of Lubricant Products

Golden Gate Transit

	TS-1	TS-2	TS-3	TS-4	TS-5	TS-6	TS-7	TS-8	TS-9	TS-10	TS-11	TS-12
Bulk Quantities												
Unit cost												
Totals												
Drum (55 gl) rate	55 gl		275gl	495gl			55gl			550gl	275gl	
Barrel (per lb) rate									12000lb			240lb
Unit cost	x		x	x			x		x	x	x	x
Totals	\$		\$	\$			\$		\$	\$		\$

TS-1 AUTOMATIC TRANSMISSION FLUID, (MINERAL BASE)

TS-2 SYNTHETIC AUTOMATIC TRANSMISSION FLUID

TS-3 SYNTHETIC AUTOMATIC TRANSMISSION FLUID, (TES-295 APPROVAL)

TS-4 HEAVY DUTY DIESEL ENGINE OIL 30W & 40W ENGINE OIL REQUIREMENTS

TS-5 CUMMINS HEAVY DUTY NATURAL GAS/ LPG ENGINE OIL 15W-40 ENGINE OIL REQUIREMENTS

TS-6 DETROIT DIESEL APPROVED HEAVY DUTY 15W-40 CNG ENGINE OILS

TS-7 AVIATION HYDRAULIC FLUID

TS-8 ISO 46 HYDRAULIC OIL

TS-9 HEAVY DUTY GEAR OIL, SAE 85W-140

TS-10 GASOLINE ENGINE MULTIGRADE ENGINE OIL 5W-30

TS-11 CHASSIS LUBRICANT

TS-12 WHEEL BEARING GREASE

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

BID FORM

Estimated yearly usage of Lubricant Products

Santa Cruz Metropolitan Transit

	TS-1	TS-2	TS-3	TS-4	TS-5	TS-6	TS-7	TS-8	TS-9	TS-10	TS-11	TS-12
Bulk Quantities	1450gl				350gl							
Unit cost	x				x							
Totals	\$				\$							
Drum (55 gl) rate										165gl		
Barrel (per lb) rate									3200lb			120lb
Unit cost									x	x		x
Totals									\$	\$		\$

- TS-1 AUTOMATIC TRANSMISSION FLUID, (MINERAL BASE)
- TS-2 SYNTHETIC AUTOMATIC TRANSMISSION FLUID
- TS-3 SYNTHETIC AUTOMATIC TRANSMISSION FLUID, (TES-295 APPROVAL)
- TS-4 HEAVY DUTY DIESEL ENGINE OIL 30W & 40W ENGINE OIL REQUIREMENTS
- TS-5 CUMMINS HEAVY DUTY NATURAL GAS/ LPG ENGINE OIL 15W-40 ENGINE OIL REQUIREMENTS
- TS-6 DETROIT DIESEL APPROVED HEAVY DUTY 15W-40 CNG ENGINE OILS
- TS-7 AVIATION HYDRAULIC FLUID
- TS-8 ISO 46 HYDRAULIC OIL
- TS-9 HEAVY DUTY GEAR OIL, SAE 85W-140
- TS-10 GASOLINE ENGINE MULTIGRADE ENGINE OIL 5W-30
- TS-11 CHASSIS LUBRICANT
- TS-12 WHEEL BEARING GREASE

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

CONTRACT

CONTRACTOR IS REQUIRED TO INCLUDE THESE PROVISIONS IN ANY
SUBCONTRACTS UNDER THIS CONTRACT.

1. **NO OBLIGATION BY THE FEDERAL GOVERNMENT**

- A. The District and Contractor acknowledge and agree that, notwithstanding any concurrence by the Federal Government in or approval of the solicitation or award of the underlying contract, absent the express written consent by the Federal Government, the Federal Government is not a party to this contract and shall not be subject to any obligations or liabilities to the District, Contractor or any other party (whether or not a party to that contract) pertaining to any matter resulting from the underlying contract.
- B. The Contractor agrees to include the above clause in each subcontract financed in whole or in part with Federal assistance provided by FTA. It is further agreed that the clause shall not be modified, except to identify the subcontractor who will be subject to its provisions.

2. **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS AND RELATED ACTS**

- A. The Contractor acknowledges that the provisions of the Program Fraud Civil Remedies Act of 1986, as amended, 31 U.S.C. § 3801 et seq. and U.S. DOT regulations, "Program Fraud Civil Remedies," 49 C.F.R. Part 31, apply to its actions pertaining to this Project. Upon execution of the underlying contract, the Contractor certifies or affirms the truthfulness and accuracy of any statement it has made, it makes, it may make, or causes to be made, pertaining to the underlying contract or the FTA assisted project for which this contract work is being performed. In addition to other penalties that may be applicable, the Contractor further acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification, the Federal Government reserves the right to impose the penalties of the Program Fraud Civil Remedies Act of 1986 on the Contractor to the extent the Federal Government deems appropriate.
- B. The Contractor also acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification to the Federal Government under a contract connected with a project that is financed in whole or in part with Federal assistance originally awarded by FTA under the authority of 49 U.S.C. § 5307, the Government reserves the right to impose the penalties of 18 U.S.C. § 1001 and 49 U.S.C. § 5307(n)(1) on the Contractor, to the extent the Federal Government deems appropriate.

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

CONTRACT

- C. The Contractor agrees to include the above two clauses in each subcontract financed in whole or in part with Federal assistance provided by FTA. It is further agreed that the clauses shall not be modified, except to identify the subcontractor who will be subject to the provisions.

3. **ACCESS TO RECORDS**

Access to Records of Recipients and Subrecipients. Upon request, the Recipient agrees to permit and require its Subrecipients to permit the Secretary of Transportation, the Comptroller General of the United States, and, if appropriate, the State, or their authorized representatives, to inspect all Project work, materials, payrolls, and other data, and to audit the books, records, and accounts of the Recipient and its Subrecipient pertaining to the Project.

4. **FEDERAL CHANGES**

Contractor shall at all times comply with all applicable FTA regulations, policies, procedures, and directives, including without limitation those listed directly or by reference in the contract between the Purchaser and the FTA, as they may be amended or promulgated from time to time during the term of this contract. Contractor's failure to so comply shall constitute a material breach of this contract.

5. **CIVIL RIGHTS REQUIREMENTS**

- A. Nondiscrimination. In accordance with Title VI of the Civil Rights Act, as amended, 42 U.S.C. § 2000d, section 303 of the Age Discrimination Act of 1975, as amended, 42 U.S.C. § 6102, section 202 of the Americans with Disabilities Act of 1990, 42 U.S.C. § 12132, and Federal transit law at 49 U.S.C. § 5332, the Contractor agrees that it will not discriminate against any employee or applicant for employment because of race color, creed, national origin, sex, age, or disability. In addition, the Contractor agrees to comply with applicable Federal implementing regulations and other implementing requirements FTA may issue.
- B. Equal Employment Opportunity. The following equal employment opportunity requirements apply to this contract:

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

CONTRACT

1. Race, Color, Creed, National Origin, Sex. In accordance with Title VII of the Civil Rights Act, as amended, 42 U.S.C. § 2000e, and Federal transit laws at 49 U.S.C. § 5332, the Contractor agrees to comply with all applicable equal employment opportunity requirements of U.S. Department of Labor (U.S. DOL) regulations, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor," 41 C.F.R. Parts 60 et seq., (which implement Executive Order No. 11246, "Equal Employment Opportunity," as amended by Executive Order No. 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," 42 U.S.C. § 2000e note), and with any applicable Federal statutes, executive orders, regulations, and Federal policies that may in the future affect construction activities undertaken in the course of the Project. The Contractor agrees to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, creed, national origin, sex, or age. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. In addition, the Contractor agrees to comply with any implementing requirements FTA may issue.
2. Age. In accordance with section 4 of the Age Discrimination in Employment Act of 1967, as amended, 29 U.S.C. § 623 and Federal transit law at 49 U.S.C. § 5332, the Contractor agrees to refrain from discrimination against present and prospective employees for reason of age. In addition, the Contractor agrees to comply with any implementing requirements FTA may issue.
3. Disabilities. In accordance with section 102 of the Americans with Disabilities Act, as amended, 42 U.S.C. § 12112, the Contractor agrees that it will comply with the requirements of U.S. Equal Employment Opportunity Commission, "Regulations to Implement the Equal Employment Provisions of the Americans with Disabilities Act," 29 C.F.R. Part 1630, pertaining to employment of persons with disabilities. In addition, the Contractor agrees to comply with any implementing requirements FTA may issue.
4. The Contractor also agrees to include these requirements in each subcontract financed in whole or in part with Federal assistance provided by FTA, modified only if necessary to identify the affected parties.

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

CONTRACT

6. **TERMINATION**

Supplementing Paragraph 14 of the General Conditions, Instructions and Information for Bidder, in the event that the Contractor breaches the terms or violates the conditions of the contract to be awarded, and does not within ten (10) days of written notice from the District cure such breach or violation, the District may immediately terminate the contract, and shall pay the Contractor only its allowable costs to date of termination.

A. Termination for Convenience

The District may terminate this contract, in whole or in part, at any time by written notice to the Contractor when it is in the District's best interest. The Contractor shall be paid its costs, including contract closeout costs, and profit on work performed up to the time of termination. The Contractor shall promptly submit its termination claim to District to be paid the Contractor. If the Contractor has any property in its possession belonging to the District, the Contractor will account for the same, and dispose of it in the manner the District directs.

B. Termination for Default [Breach or Cause]

If the Contractor does not deliver supplies in accordance with the contract delivery schedule, or, if the contract is for services, the Contractor fails to perform in the manner called for in the contract, or if the Contractor fails to comply with any other provisions of the contract, the District may terminate this contract for default. Termination shall be effected by serving a notice of termination on the contractor setting forth the manner in which the Contractor is in default. The Contractor will only be paid the contract price for supplies delivered and accepted, or services performed in accordance with the manner of performance set forth in the contract.

If it is later determined by the District that the Contract had an excusable reason for not performing s, such as a strike, fire or flood, events which are not the fault of or are beyond the control of the Contractor, the District, after setting up a new delivery of performance schedule, may allow the Contractor to continue work, or treat the termination as a termination for convenience.

C. Opportunity to Cure

The District in its sole discretion may, in the case of termination for breach or default, allow the Contractor ten (10) days in which to cure the defect. In such case, the notice of termination will state the time period in which cure is permitted and other appropriate conditions.

If the Contractors fails to remedy to District's satisfaction the breach or default or any other terms, covenants, or conditions of this Contract within ten (10) days

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

CONTRACT

after receipt by Contractor or written notice from District setting forth the nature of said breach or default, District shall have the right to terminate the Contract without any further obligation to Contractor. Any such termination for default shall not in any way operate to preclude District from also pursuing all available remedies against the Contractor and its sureties for said breach or default.

D. Waiver of Remedies for any Breach

In the event that District elects to waive its remedies for any breach by Contractor of any covenant, term or condition of this Contract, such waiver by District shall not limit District's remedies for any succeeding breach of that or of any other term, covenant or condition of this Contract.

E. Termination for Default (Supplies and Service)

If the Contractor fails to deliver supplies or to perform the services within the time specified in this contract or any extension or if the Contractor fails to comply with any other provisions of this contract, the District may terminate this contract for default. The District shall terminate by delivering to the Contractor a Notice of Termination specifying the nature of the default. The Contractor will only be paid the contract price for supplies delivered and accepted, or services performed in accordance with the manner or performance set forth in this contract.

If, after termination for failure to fulfill contract obligations, it is determined that the Contractor's was not in default, the rights and obligations of the parties shall be the same as if the termination had been issued for the convenience of the District.

7. DISADVANTAGED BUSINESS ENTERPRISE (DBE) POLICY

- A. It is the policy of the district to ensure non-discrimination in the award and administration of all contracts and to create a level playing field on which disadvantaged Business Enterprises (DBEs) can compete fairly for contracts and subcontracts relating to the District's construction, procurement and activities. To this end, the District has developed procedures to remove barriers to DBE participation in the bidding and award process and to assist DBEs to develop and compete successfully outside of the DBE Program. In connection with the performance of this contract, the Contractor will cooperate with the District in meeting these commitments and objectives.
- B. The District, recipient of Federal financial assistance from the Federal Transit Administration (FTA) is committed to and has adopted a DBE

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

CONTRACT

Program in accordance with federal regulations 49 CFR Part 26, issued by the U.S. Department of Transportation (U.S. DOT).

- C. Pursuant to 49 CFR §26.13, the Contractor is required to make the following assurance in its agreement with the District and to include this assurance in any agreements it makes with Subcontractors in the performance of this contract:

"The Contractor or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this contract. The Contractor shall carry out applicable requirements of 49 CFR Part 26 in the award and administration of U.S. DOT assisted contracts. Failure by the Contractor or Subcontractor to carry out these requirements is a material breach of this contract, which may result in the termination of this contract or such other remedy, as the District deems appropriate."

Additionally, all of the requirements described in the DBE Program shall be met. A contract that has a specific DBE participation goal will be described in the Special Conditions. Any bidder who would like to request additional information or ask questions regarding the District's DBE Program may contact the District's DBE Representative at (510) 577-8818.

Prompt Payment to Subcontractors. In accordance with the District's DBE Program, the contractor shall pay any subcontractors approved by the District for work that has been satisfactorily performed no later than thirty (30) days from the date of contractor's receipt of progress payments by the District. Within sixty (60) days of satisfactory completion of all work required of the subcontractor, contractor shall release any retainage payments withheld to the subcontractor.

8. INCORPORATION OF FEDERAL TRANSIT ADMINISTRATION (FTA) TERMS

The following provisions include, in part, certain Standard Terms and Conditions required by DOT, whether or not expressly set forth in the preceding contract provisions. All contractual provisions required by DOT, as set forth in FTA Circular 4220.1E, dated June 19, 2003, are hereby incorporated by reference. Anything to the contrary herein notwithstanding, all FTA mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Contract. The Contractor shall not perform any act, fail to perform any act, or refuse to comply with any AC TRANSIT requests which would cause AC TRANSIT to be in violation of the FTA terms and conditions.

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

CONTRACT

9. **ENVIRONMENTAL PROTECTION**

The Recipient agrees to comply with all applicable requirements of the National Environmental Policy Act of 1969, as amended, 42 U.S.C. §§ 4321 *et seq.*, Executive Order No. 11514, as amended, "Protection and Enhancement of Environmental Quality," 42 U.S.C. § 4321 note; FTA statutory requirements at 49 U.S.C. § 5324(b); Council on Environmental Quality regulations pertaining to compliance with the National Environmental Policy Act of 1969, as amended, 40 C.F.R. Part 1500 *et seq.*; the joint FHWA/FTA regulations, "Environmental Impact and Related Procedures," 23 C.F.R. Part 771 and 49 C.F.R. Part 622, and, when promulgated, FHWA/FTA joint regulations, "NEPA and Related Procedures for Transportation Decision making, Protection of Public Parks, Wildlife and Waterfowl Refuges, and Historic Sites," 23 C.F.R. Part 1420 and 49 C.F.R. Part 623.

10. **ENERGY CONSERVATION**

The Contractor shall recognize mandatory standards and policies relating to energy efficiency which are contained in the State energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. Section 6321 *et seq.*).

11. **RECYCLED PRODUCTS**

The Contractor agrees to comply with all the requirements of Section 6002 of the Resource Conservation and Recovery Act (RCRA), as amended (42 U.S.C. 6962), including but not limited to the regulatory provisions of 40 CFR Part 247, and Executive Order 12873, as they apply to the procurement of the items designated in Subpart B of 40 CFR Part 247.

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LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

CONTRACT

THIS CONTRACT is made and entered into this _____ day of _____ 2004 by, and between ALAMEDA CONTRA COSTA TRANSIT DISTRICT (hereinafter referred to as "District"), a special transit district established pursuant to California Public Utilities Code, Section 24501 et seq., and _____ (hereinafter referred to as "Contractor").

THE PARTIES AGREE AS FOLLOWS:

1. SCOPE OF WORK

Contractor shall furnish to the District all labor, equipment, supplies, material and services as specified in and in full accordance with the Contract Document issued by the District entitled:

LUBRICATION PRODUCTS NO. 2004-879RTCC

2. COMPONENT PARTS

This Contract shall consist of the following documents, each of which is on file with the District, and is incorporated into and made a part of the Contract by reference:

- A. This Contract
- B. Invitation for Bid No. 2004-879RTCC and any Addenda thereto
- C. Contractor's submitted Bid Form

3. PERIOD OF PERFORMANCE

Contractor shall furnish premium engine oil as specified in the Contract to commence Month/Day, 2004 and continue through Month/Day, 2006.

4. CONTRACT PRICE

The District agrees to pay the Contractor in accordance with the fixed rates on the submitted bid form with a budgeted ceiling of \$_____ per the term of this contract. This amount shall include costs for materials, delivery, and any other costs necessary to provide the lubrication products. The District and the Contractor must mutually agree upon any adjustments in payment. Invoices should be submitted in triplicate by the Contractor in accordance with the delivery schedule of the contract, to AC Transit Accounts Payable, P.O. Box 28507, Oakland, CA. 94604. **Please reference the Contract Number and the Purchase Order Number on the invoice.**

LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

CONTRACT

5. **ATTORNEY'S FEES**

In the event that it becomes necessary for either party to bring a lawsuit to enforce any of the provisions of the Contract, the parties agree that the court having jurisdiction over such dispute shall have the authority to determine and fix reasonable attorney's fees to be paid to the prevailing party.

6. **SEVERABILITY**

If any provision of the Contract is declared void or unenforceable, such provision shall be deemed severed from this Agreement, which shall otherwise remain in full force and effect.

7. **BINDING EFFECT**

All of the terms, provisions and conditions of the Contract hereunder shall be binding upon and inure the parties hereto and their respective successors, assigns and legal representatives.

8. **ENTIRE AGREEMENT**

This Contract represents the entire agreement of the parties with respect to the subject matter hereof, and all such agreements entered into prior hereto are revoked and superseded by this Contract, and no representations, warranties, inducements or oral agreements have been made by any of the parties except as expressly set forth herein, or in other contemporaneous written agreements.

This Contract may not be changed, modified or rescinded except in writing, signed by all parties hereto, and any attempt at oral modification of this Agreement shall be void and of no effect.

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LUBRICATION PRODUCTS
FOR THE TERM MONTH/DAY, 2004 THROUGH MONTH/DAY, 2006

CONTRACT

IN WITNESS WHEREOF, the parties have executed this Contract on the dates set forth below.

ALAMEDA-CONTRA COSTA
TRANSIT DISTRICT:

CONTRACTOR:

Rick Fernandez
General Manager

Date

Name
Title

Date

Approved as to Form:

Kenneth C. Scheidig
General Counsel

Date

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

DATE: January 28, 2005
TO: Board of Directors
FROM: Mark J. Dorfman, Assistant General Manager
SUBJECT: CONSIDERATION OF A RESOLUTION AUTHORIZING AN APPLICATION TO CALTRANS FOR FY2005 RURAL OPERATING ASSISTANCE

I. RECOMMENDED ACTION

Adopt a resolution authorizing the General Manager to submit a grant application to the California Department of Transportation to assist funding public transit operations in the non-urbanized part of Santa Cruz County.

II. SUMMARY OF ISSUES

- Each year, the Federal Transit Administration apportions federal funds through the state to assist public transit operators in non-urbanized areas.
- This year, Caltrans apportioned \$65,475 to Santa Cruz County.
- To receive these funds, the District must define operating projects for public transit service in the non-urbanized portion of the County and submit an application to the Caltrans Region 5 office.
- The attached resolution authorizes the General Manager to coordinate with public transit providers, submit an application and execute a grant agreement for financial assistance for public transit operation in rural Santa Cruz County.

III. DISCUSSION

Under Chapter 49, United States Code Section 5311, the Federal Transit Administration grants financial aid to the states to support intercity public transit in non-urbanized areas. The State of California apportions the FTA Section 5311 funds each year to the counties. Caltrans apportioned \$65,475 to Santa Cruz County for FY 2005.

The Section 5311 funds are available only for public transit in non-urbanized areas, those areas within a county that lie beyond a designated urban area with over 50,000 population. As part of the grant application, the District develops a program of projects identifying the public transit service to be provided in the non-urbanized areas of Santa Cruz County. The Program of Projects is included as Attachment A. The District will make reasonable efforts to coordinate this project with social service agencies and other transit providers within the service area, although no public hearing is required.

14.1

Adopting the attached resolution will authorize the General Manager to submit an application to the Caltrans District 5 Office for FTA §5311 funds. The Santa Cruz County Regional Transportation Commission will adopt the program of projects for inclusion in the Regional Transportation Improvement Plan to be incorporated into the State Transportation Improvement Plan as required by the Section 5311 program.

IV. FINANCIAL CONSIDERATIONS

This grant will provide \$65,475 in operating revenue to the District. The District will contribute \$875,347.56 in local matching funds from the FY 2005 operating budget to fully fund the project.

V. ATTACHMENTS

Attachment A: Section 5311 Program of Projects

Attachment B: Resolution Authorizing FTA Section 5311 application

14.2

**STATE OF CALIFORNIA FTA SECTION 5311
REGIONAL PROGRAM OF PROJECTS (POP) – FISCAL YEAR 2004/2005 – GRANT 23**

COUNTY/ REGION: Santa Cruz County
 CALTRANS DISTRICT: 05
 ORIGINAL SUBMISSION DATE 12/16/04 REVISION SUBMISSION DATE: _____

CARRYOVER:	\$	<u>00</u>
CURRENT APPORTIONMENT: (+)	\$	<u>65,475</u>
TOTAL FUNDS AVAILABLE: (=)	\$	<u>65,475</u>

Section 5311 Regional Apportionment: Please see Section 5311 Handbook, Chapter III

NOTE: Do not list previously approved projects (ie projects listed in a prior grant).

PART I - OPERATING ASSISTANCE-- May apply for two years, but each year has to be listed separately.

SUBRECIPIENT	TIME PERIOD	FY	NET PROJECT COST	FEDERAL SHARE
1. <u>Santa Cruz Metropolitan Transit District</u>	<u>July 1, 2004</u> to <u>June 30, 2005</u>	<u>2005</u>	\$ <u>940,832.56</u>	\$ <u>65,475.00</u>
2. _____	July 1, _____ to June 30, _____	_____	\$ _____	\$ _____

PART II - CAPITAL - For vehicle procurement indicate quantity, vehicle size, vehicle length, passenger capacity, fuel type and expansion (E) or replacement (R).

SUBRECIPIENT	PROJECT DESCRIPTION	ESTIMATED COMPLETION DATE	NET PROJECT COST	FEDERAL SHARE
1. _____	_____	_____	\$ _____	\$ _____
2. _____	_____	_____	\$ _____	\$ _____
3. _____	_____	_____	\$ _____	\$ _____
Section 5311 Regional-Apportionment - Total			\$ <u>940,832.56</u>	\$ <u>65,475.00</u>

Flexible Funds - CMAQ, STP, or Federalized STIP*: Please see Section 5311 Handbook, Chapter IV

PART III – FLEXIBLE FUNDS - Project description and associated dollar amounts must be consistent with attached Federally approved TIP page.

SUBRECIPIENT	PROJECT DESCRIPTION	FUND TYPE	FTIP PAGE ATTACHED	APPLICATION ATTACHED*	NET PROJECT COST	FEDERAL SHARE
1. _____	_____	_____	_____	_____	\$ _____	\$ _____
2. _____	_____	_____	_____	_____	\$ _____	\$ _____
3. _____	_____	_____	_____	_____	\$ _____	\$ _____

*Federalized STIP Projects must provide the date of the California Transportation Commission allocation approval.

Flexible Fund – Total	\$	_____	\$	_____
Total Programmed	\$	<u>940,832.56</u>	\$	<u>65,475.00</u>

14.a1

Attachment A

BEFORE THE BOARD OF DIRECTORS OF THE
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

Resolution No. _____

On the Motion of Director: _____

Duly Seconded by Director: _____

The Following Resolution is Adopted:

**A RESOLUTION
AUTHORIZING AN APPLICATION
TO THE CALIFORNIA DEPARTMENT OF TRANSPORTATION
FOR
FTA SECTION 5311 FY2005 RURAL OPERATING ASSISTANCE**

WHEREAS, the Federal Transit Act authorizes financial assistance to public transit operators in non-urbanized areas as directed by 49 CFR 5311; and

WHEREAS, the California Department of Transportation administers the Section 5311 program in California and allocates federal funds by formula to each county with intercity public transit between urban areas including more than 50,000 persons; and

WHEREAS, the Santa Cruz Metropolitan Transit District operates intercity public transit in Santa Cruz County and is the only public transit operator designated to receive federal financial assistance from the Section 5311 program; and

WHEREAS, all applications for financial assistance impose certain obligations upon the applicant, including the provision of local share costs of the project.

NOW, THEREFORE, BE IT RESOLVED AND ORDERED BY THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT:

1. That the General Manager is authorized to submit an application to the State of California Department of Transportation on behalf of the Santa Cruz Metropolitan Transit District for financial assistance to operate public transit service in non-urbanized portion of Santa Cruz County.
2. That the General Manager is authorized to submit and file with this application all assurances and all supplemental information as required by the California Department of Transportation.
3. That the General Manager is designated to execute standard grant agreements with the California Department of Transportation on behalf of the Santa Cruz Metropolitan Transit District to obtain \$65,475 in FTA Section 5311 funds for Fiscal Year 2005 to assist with public transit operations in the non-urbanized portion of Santa Cruz County.

14. b 1

4. That the District has committed \$875,357.56 in local matching funds to the project.
5. That the Santa Cruz Metropolitan Transit District has, to the extent feasible, coordinated this project with other transportation providers and users in the region, including social service agencies capable of purchasing public transit.

PASSED AND ADOPTED this 28^h day of January, 2005 by the following vote:

AYES: Directors -

NOES: Directors -

ABSTAIN: Directors -

ABSENT: Directors -

APPROVED _____
EMILY REILLY
Chairperson

ATTEST _____
LESLIE R. WHITE
General Manager

APPROVED AS TO FORM:

MARGARET GALLAGHER
District Counsel

14. b2

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

DATE: January 17, 2004
TO: Board of Directors
FROM: Bryant J. Baehr, Manager of Operations
SUBJECT: CONSIDERATION OF CALL STOP AUDIT REPORT

I. RECOMMENDED ACTION

This report is for informational purposes only. No Action is required.

II. SUMMARY OF ISSUES

- At the November 2001 Board of Directors meeting staff was authorized to conduct quarterly call stop compliance audits.
- Staff contracted with Robert S. Bortnick & Associates, a private investigative firm, to conduct the audit.
- On July 25, 2003 the base programming of the Talking Bus was completed and implemented. There are 48 bus routes, approximately 1,050 bus stops and 3,622 call stops.

III. DISCUSSION

At the November 2001 Board of Directors meeting staff was authorized to conduct quarterly call stop compliance audits. Staff contracted with Robert S. Bortnick & Associates, a private investigative firm, to conduct the audit. Robert S. Bortnick & Associates was authorized 100 hours to conduct a survey at a cost of \$5,000.00 each quarter. On July 25, 2003 the Talking Bus was activated on all routes encompassing 3,622 programmed call stops (trigger points). The Transit District has 48 routes serving approximately 1,050 bus stops. Each route has independent trigger points and call stops taking the number of programmed call stops and trigger points to 3,622.

Attachment A details the results of the current audit.

IV. FINANCIAL CONSIDERATIONS

Randomly conducted call stop compliance audits cost approximately \$20,000 per year.

V. ATTACHMENTS

Attachment A: Summary of Audit Results

Attachment B: Table of Results from Robert S. Bortnick & Associates dated October – December 2004.

15.1

Summary of the call stop audit results:

	April – May 2002	Aug 2002	Nov 2002	Feb / March 2003	April / May / June / July 2003	July – Sept 2003	October/ December 2003	January / March 2004	April / June 2004	July/Aug/ Sept 2004	Oct – Dec 2004
Call Stops observed	194	218	232	436	88 – Boardings	2,418	2,596	2,378	3,223	2855	2294
Call stops announced	186	190	232	398	88 – Operation al Systems	2,305	2,558	2,371	3,165	2842	2258
Call stops not announced	8	28	0	38	0	113	38	7	58	11	36*
Percent of call stops completed	96%	88%	100 %	91.3%	0	95.3%	98.5%	99.7%	98.2%	99.6%	98.4
Percent of call stops not completed	4%	13%	0%	8.7%	0	4.7%	1.5%	.3%	1.8%	.4%	1.6

*The investigative report cited 39 call stops missed. After conducting an audit of the call stops missed, three (3) missed call stops were eliminated due to inaccurate application of the call stop audit forms or the bus not performing a portion of a route that was counted as a missed stop.

One (1) bus operator was placed into the Board of Directors adopted disciplinary schedule for missed call stops.

15.91

ROBERT S. BORTNICK & ASSOCIATES
PRIVATE INVESTIGATION

CRIMINAL/CIVIL
CA. LIC. NO. P111733

136 VERNON STREET
SANTA CRUZ, CALIFORNIA 95060
TELEPHONE (831) 423-5122
FAX (831) 459-0430
E-MAIL: BortnickPI@yahoo.com

ADA CALL STOP SURVEY RESULTS
(OCTOBER – DECEMBER 2004)

Statistical Summary

Total number of trips surveyed	_____	75	
Total number of trips with talking buses	_____	75 (100%)	
Total number of call stops surveyed	_____	2,296	— 2294
Total number of call stops made	_____	2,257 (98%)	— 2258
Total number of call stops missed	_____	39	— 36

Key to Codes

E = external announcement failure
H = head sign failure

M = missed call stops
V = visual failure only

15. b1

Table of Results

<u>ROUTE</u>	<u>DATE</u>	<u>CALLS MADE</u>	<u>CALLS MISSED</u>	<u>NOTES</u>
3B – Mission & N Bridges	12/28/04	41	0	
4 – HW/Paradise/Emeline	12/27/04	29	1	M
7 – Beach/Lighthouse	12/30/04	26	0	
7N – Beach Nt/Cap Mall	10/19/04	33	0	
7N – Beach Nt/Cap Mall	10/26/04	33	0	V
7N – Beach Nt/Cap Mall	10/19/04	18	0	
7N – Beach Nt/Metro Ctr	12/29/04	18	0	
7N – Beach Nt/Metro Ctr	01/03/05	18	0	
10 – UC/High St	12/29/04	18	0	
13 – UC/Walnut	01/04/05	35	0	
15 – Laurel/West	01/04/05	29	0	
16 – Laurel/East	10/19/04	14	0	
16 – Laurel/East	10/20/04	17	0	
16 – Laurel/East	12/28/04	31	0	
16 – Laurel/East	01/02/05	31	0	
19 – UC/Lower Bay	10/20/04	23	0	
19 – UC/Lower Bay	10/20/04	15	0	
19 – Lower Bay/Wknd	01/02/05	41	0	
19 – UC/Lower Bay	10/19/04	15	0	
19 – UC/Lower Bay	12/27/04	38	0	
19 – UC/Lower Bay	12/29/04	17	0	
19 – UC/Lower Bay	01/04/05	38	0	
20 – UC/Westside	10/20/04	25	0	
20 – UC/Westside	01/02/05	49	0	
32 – Graham Hill	12/30/04	38	0	
35 – Hwy 9/Country Club	12/27/04	14	0	
35 – Hwy 9/Country Club	12/29/04	37	0	
35 – Santa Cruz	11/07/04	50	0	
35 – Santa Cruz	11/20/04	50	0	
35 – Santa Cruz	12/27/04	24	0	
35 – Santa Cruz	12/28/04	3	35	M, H
35 – Santa Cruz	12/29/04	24	0	
35 – Santa Cruz	01/03/05	37	3	M
35A – Glen Arbor/Mtn Str	11/05/04	47	0	
35A – Glen Arbor/Mtn Str	11/07/04	47	0	
35A – Glen Arbor/CClub	11/20/04	47	0	
35A – Hwy 9/Bear Crk/Sy	01/03/05	41	0	
35A – Hwy 9/Country Clu	12/28/04	46	0	
40 – Santa Cruz	01/02/05	15	0	
40 – Waddell Crk/Davnpt	01/02/05	12	0	
41 – Bonny Doon	12/30/04	33	0	
41 – Santa Cruz	12/30/04	27	0	

Table of Results

<u>ROUTE</u>	<u>DATE</u>	<u>CALLS MADE</u>	<u>CALLS MISSED</u>	<u>NOTES</u>
54 – Aptos/La Selva Bch	11/07/04	48	0	
54 – Aptos/La Selva Bch	11/20/04	50	0	
54 – Capitola Mall	11/07/04	44	0	
54 – Capitola Mall	11/20/04	43	0	
54 – Capitola Mall	01/04/05	6	0	
66 – 17 th Ave/Cap Mall	10/18/04	32	0	
66 – 17 th Ave/Cap Mall	12/27/04	32	0	
66 – 17 th Ave/Cap Mall	01/02/05	32	0	
66 – 17 th Ave/SC	10/19/04	30	0	
66 – 17 th Ave/SC	01/07/04	30	0	
66 – 17 th Ave/SC	11/20/04	30	0	
66 – 17 th Ave/SC	01/02/05	30	0	
66 – 17 th Ave/SC	01/03/05	30	0	
66 – 17 th Ave/SC	01/04/05	30	0	
68 – Capitola Mall	11/07/04	25	0	E
68 – Capitola Mall	11/20/04	25	0	
69 – Capitola Road	12/29/04	20	0	
69 – Santa Cruz	01/03/05	18	0	
69A – Cap Rd/SC	01/02/05	39	0	
69A – Cap Rd/Watsonvl	12/28/04	39	0	
69N – Cap Mall/Cabrillo	10/19/04	20	0	
69N – Cap Mall/Cabrillo	01/03/05	19	0	
69N – SC/Cap Village	10/18/04	18	0	
69N – SC/Cap Village	10/26/04	18	0	
69W – Cabrillo/SC	12/27/04	18	0	
69W – Cabrillo/SC	01/03/05	18	0	
69W – Cabrillo/SC	01/04/05	37	0	
69W – Cabrillo/Watsnvl	01/02/05	39	0	
69W – Cabrillo/Watsnvl	01/03/05	19	0	
69W – Cabrillo/Watsnvl	01/04/05	12	0	
70 – Cabrillo	01/03/05	26	0	
71 – Clifford/SC	12/28/04	66	0	
71 – Pennsylvania/Wats	01/04/05	70	0	

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

DATE: January 14, 2005
TO: Board of Directors
FROM: Leslie R. White, General Manager
SUBJECT: CONSIDERATION OF NOMINATION OF DIRECTORS TO SERVE AS BOARD OFFICERS, AND NOMINATIONS FOR APPOINTMENTS TO THE HIGHWAY 1 CONSTRUCTION AUTHORITY AND TO THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION FOR 2005.

ACTION REQUESTED

I. RECOMMENDED ACTION

That the Board of Directors identify nominees from the Board to be considered for election to the positions Board Chair, Vice Chair, Representative to the Highway 1 Construction Authority, and Representatives and Alternates for the Santa Cruz County Regional Transportation Commission.

II. SUMMARY OF ISSUES

- Article 6 of the METRO Bylaws provides that the Board of Directors shall annually nominate members to be considered for election to the positions of Chair and Vice Chair.
- It is necessary for the Board of Directors to nominate members to be considered for election to represent METRO on the Board of Directors of the Highway 1 Construction Authority (HCA).
- In order to maintain representation on the Santa Cruz County Regional Transportation Commission (SCCRTC) it is necessary that the Board of Directors nominate members to be considered for election to the three positions and three alternate positions that are provided for METRO.
- Currently elections for the positions referenced in this Staff Report are scheduled to be held at the January 28, 2005 Board of Directors meeting.

III. DISCUSSION

The terms of the officers and appointees of the Board of Directors in the positions of Chair, Vice Chair, HCA appointee, and SCCRTC appointees expire in January 2005. The METRO Bylaws provide that the Board of Directors shall identify nominees to be considered for election to the positions herein referenced.

16.1

Staff recommends that the Board of Directors identify members to be nominees for the positions of Chair, Vice Chair, HCA appointee, and SCCRTC appointees and alternates. The election of nominees to the referenced positions is scheduled to be held January 28, 2005.

IV. FINANCIAL CONSIDERATIONS

Funding support for the positions identified in this Staff Report is contained in the adopted METRO FY 2005 Operating Budget.

V. ATTACHMENTS

None