



SunLine Transit Agency/  
 SunLine Services Group  
 June 25, 2025  
 12:00 p.m.

**Joint Regular Meeting of the SunLine Transit Agency &  
 SunLine Services Group Board of Directors  
 Regular Board of Directors Meeting**

**Board Room  
 32-505 Harry Oliver Trail  
 Thousand Palms, CA 92276**

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**NOTICE TO THE PUBLIC**

SunLine has discontinued its COVID-19 Emergency Declaration and has returned its Board and Board Committee meetings to live and in-person attendance at the location noted above. These meetings are no longer available for viewing, attendance, or comment by two-way audiovisual platform, two-way telephonic service, webcasting, or streaming video broadcast. SunLine may prepare audio or video recordings of Board meetings. In accordance with the Brown Act and California Public Records Act, these recordings are subject to public inspection for a period of thirty (30) days after the meeting.

In compliance with the Brown Act, agenda materials distributed to the Board 72 business hours or less prior to the meeting, which are public records relating to open-session agenda items, will be available for inspection by members of the public prior to or at the meeting at SunLine Transit Agency’s Administration Building, 32505 Harry Oliver Trail, Thousand Palms, CA 92276 and on the Agency’s website, [www.sunline.org](http://www.sunline.org).

In compliance with the Americans with Disabilities Act, Government Code Section 54954.2, and the Federal Transit Administration Title VI, please contact the Clerk of the Board at (760) 343-3456 if disability-related modification(s) and/or interpreter services are needed to participate in a Board meeting. Notification of at least 72 business hours prior to the meeting time will assist staff in ensuring reasonable arrangements can be made to provide assistance at the meeting.

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**ITEM**

**RECOMMENDATION**

**1. CALL TO ORDER**

*Note: All items appearing on the agenda are subject to action by the Board. Staff recommendations are subject to change by the Board.*

**2. FLAG SALUTE**

**ITEM**

**RECOMMENDATION**

3. ROLL CALL

4. FINALIZATION OF AGENDA

5. PUBLIC COMMENTS

RECEIVE COMMENTS

**NON AGENDA ITEMS**

Members of the public may address the Board regarding any item within the subject matter jurisdiction of the Board; however, no action may be taken on off-agenda items unless authorized. Comments shall be limited to matters not listed on the agenda. Members of the public may comment on any matter listed on the agenda at the time that the Board considers that matter. Each person's comments are limited to a maximum of three (3) minutes.

6. PRESENTATIONS

7. BOARD MEMBER COMMENTS

RECEIVE COMMENTS

8. CONSENT CALENDAR

All items on the Consent Calendar will be approved by one motion, and there will be no discussion of individual items unless a Board Member requests a specific item be pulled from the calendar for separate discussion. The public may comment on any item.

**APPROVE**

- |  |              |
|--|--------------|
| 8a) Acceptance of Checks \$1,000 and Over Report for April 2025                  | (PAGE 8-13)  |
| 8b) Acceptance of Credit Card Statement for April 2025                           | (PAGE 14-30) |
| 8c) Acceptance of Monthly Budget Variance Report for April 2025                  | (PAGE 31-35) |
| 8d) Acceptance of Contracts Signed between \$25,000 and \$250,000 for April 2025 | (PAGE 36-37) |
| 8e) Acceptance of Union & Non-Union Pension Investment Asset Summary April 2025  | (PAGE 38-49) |
| 8f) Acceptance of Ridership Report for April 2025                                | (PAGE 50-53) |
| 8g) Acceptance of SunDial Operational Notes for April 2025                       | (PAGE 54-56) |
| 8h) Acceptance of Metrics for April 2025   | (PAGE 57-77) |
| 8i) Acceptance of Board Member Attendance Report for May 2025                    | (PAGE 78-79) |
| 8j) Approval of Joint Board Meeting Minutes for May 28, 2025                     | (PAGE 80-85) |
| 8k) Acceptance of SSG/SRA Checks \$1,000 and Over Report for April 2025          | (PAGE 86-87) |

<u>ITEM</u>	<u>RECOMMENDATION</u>
8l) Acceptance of Taxi Trip Data Report – April 2025	(PAGE 88-89)
8m) Acceptance of SSG Monthly Budget Variance Report for April 2025	(PAGE 90-92)
8n) Acceptance of the 2025 Music Festival Season Report	(PAGE 93-100)
<b>9. AWARD OF CONTRACT FOR COMPREHENSIVE OPERATIONAL ANALYSIS SERVICES</b> (Lynn Mallotto, Chair of Finance/Audit Committee; Staff: Paul Mattern, Chief Planning Officer)	<b>APPROVE</b> (PAGE 101-105)
<b>10. ADOPTION OF THE FISCAL YEAR 2026 OPERATING AND CAPITAL BUDGET</b> (Lynn Mallotto, Chair of Finance/Audit Committee; Staff: Luis Garcia, Chief Financial Officer)	<b>APPROVE</b> (PAGE 106-176)
<b>11. AWARD OF CONTRACT FOR FINANCIAL AUDITING SERVICES</b> (Lynn Mallotto, Chair of Finance/Audit Committee; Staff: Luis Garcia, Chief Financial Officer)	<b>APPROVE</b> (PAGE 177-180)
<b>12. REVISED ADVERTISING POLICY</b> (John Peña, Chair of Board Operations Committee; Staff: Edith Hernandez, Director of Board and Legislative Affairs)	<b>APPROVE</b> (PAGE 181-191)
<b>13. ADOPTION OF FISCAL YEAR 2026-2028 SHORT RANGE TRANSIT PLAN</b> (Denise Delgado, Chair of Strategic Planning & Operational Committee; Staff: Paul Mattern, Chief Planning Officer)	<b>APPROVE</b> (PAGE 192-308)
<b>14. ADOPTION OF FISCAL YEAR 2026 STRATEGIC PLAN</b> (Denise Delgado, Chair of Strategic Planning & Operational Committee; Staff: Greg Wildman, Chief of Strategic Alignment)	<b>APPROVE</b> (PAGE 309-341)
<b>15. ADOPTION OF THE FISCAL YEAR 2026 SUNLINE REGULATORY ADMINISTRATION BUDGET</b> (Glenn Miller, Chair of Taxi Committee; Staff: Luis Garcia, Chief Financial Officer)	<b>APPROVE</b> (PAGE 342-354)
<b>16. OPTIONS – VISION STATEMENT</b> (Staff: Greg Wildman, Chief of Strategic Alignment)	<b>APPROVE</b> (PAGE 355-356)

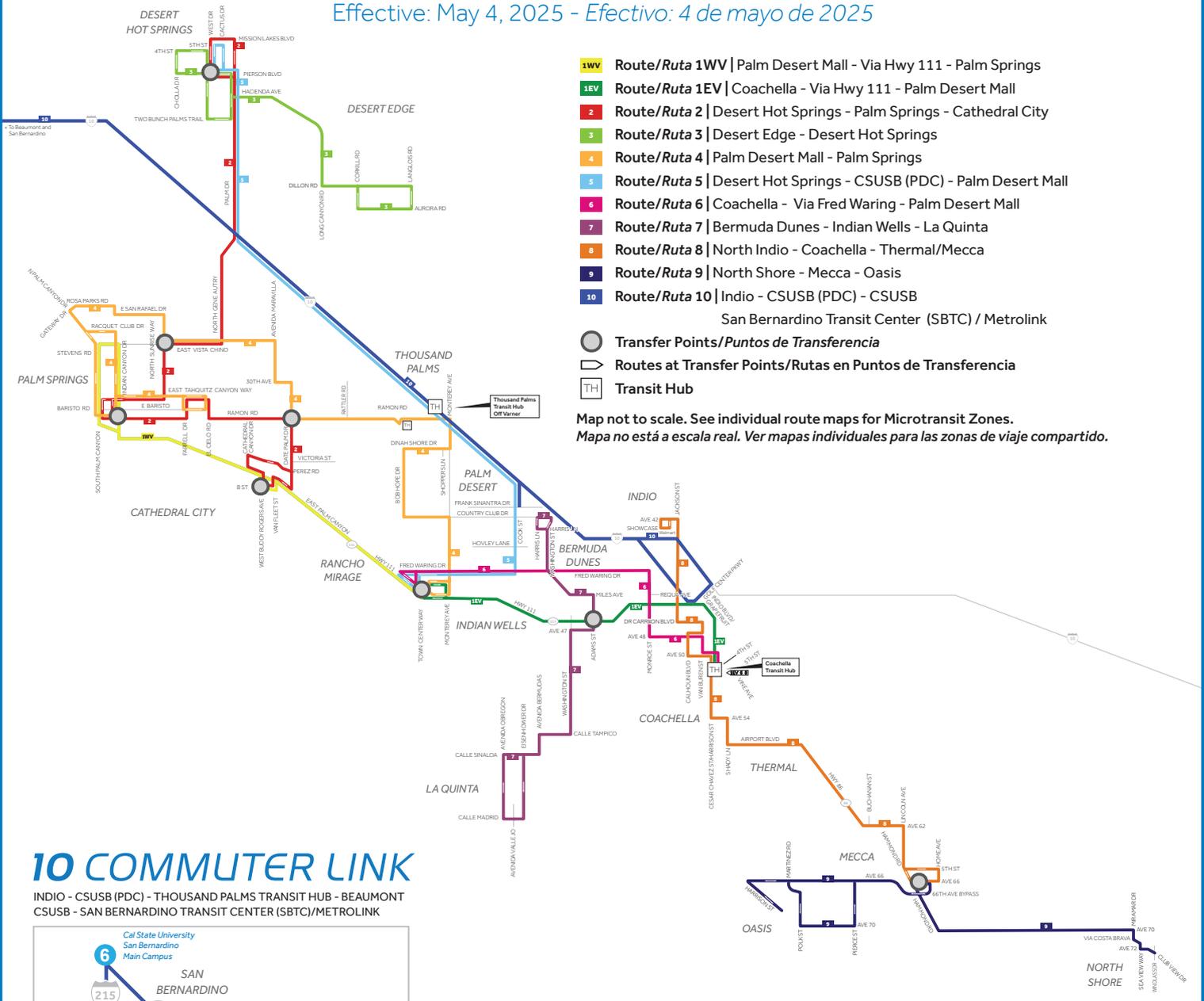
**ITEM**

**RECOMMENDATION**

- 17. **ELECTION OF OFFICERS**  
(Staff: Vanessa Ordorica, Clerk of the Board) **APPROVE**  
(PAGE 357-359)
  
- 18. **AWARD OF CONTRACT FOR FEDERAL ADVOCACY SERVICES**  
(Lynn Malotto, Chair of Finance/Audit Committee;  
Staff: Edith Hernandez, Director of Board and Legislative Affairs) **INFORMATION**  
(PAGE 360-363)
  
- 19. **AWARD OF CONTRACT FOR STATE ADVOCACY SERVICES**  
(Lynn Malotto, Chair of Finance/Audit Committee;  
Staff: Edith Hernandez, Director of Board and Legislative Affairs) **INFORMATION**  
(PAGE 364-367)
  
- 20. **LEGISLATIVE UPDATE FOR JUNE 2025**  
(Staff: Edith Hernandez, Director of Board and Legislative Affairs) **INFORMATION**  
(PAGE 368-373)
  
- 21. **CEO/GENERAL MANAGER’S REPORT**
  
- 22. **NEXT MEETING DATE**  
  
July 23, 2025 at 12 p.m.  
Board Room  
32-505 Harry Oliver Trail  
Thousand Palms, CA 92276
  
- 23. **ADJOURN**

# SYSTEM MAP - MAPA DEL SISTEMA

Effective: May 4, 2025 - Efectivo: 4 de mayo de 2025



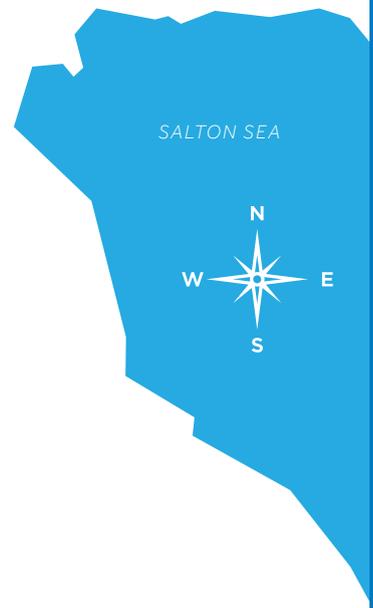
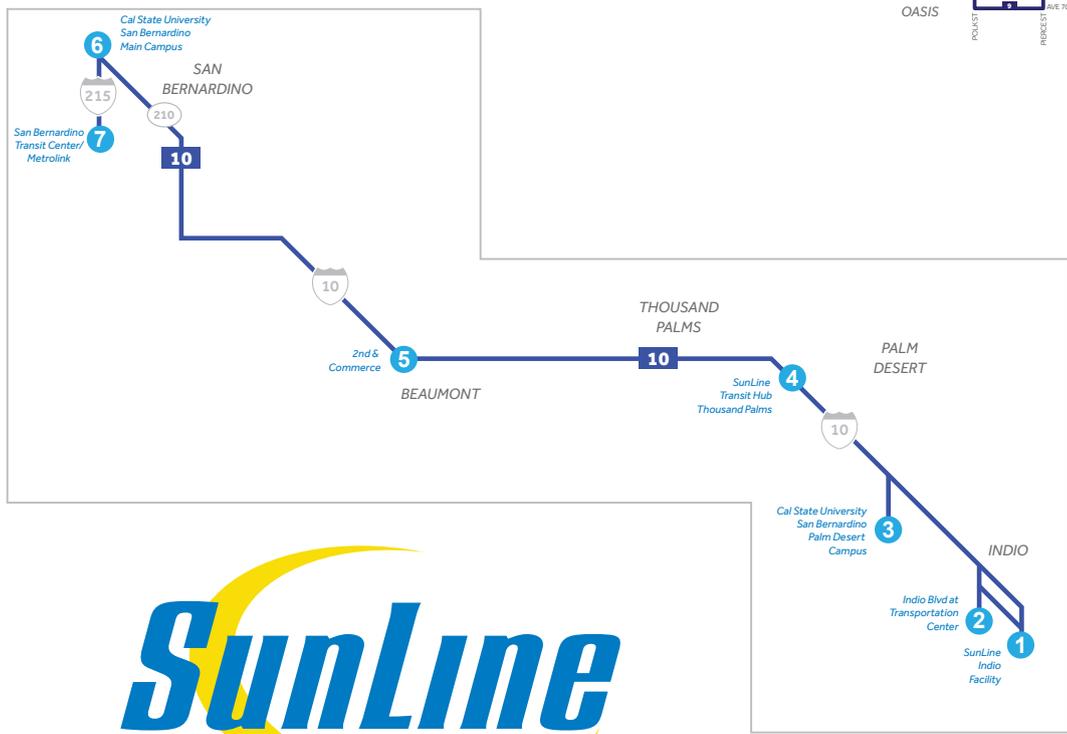
- 1WV** Route/Ruta 1WV | Palm Desert Mall - Via Hwy 111 - Palm Springs
- 1EV** Route/Ruta 1EV | Coachella - Via Hwy 111 - Palm Desert Mall
- 2** Route/Ruta 2 | Desert Hot Springs - Palm Springs - Cathedral City
- 3** Route/Ruta 3 | Desert Edge - Desert Hot Springs
- 4** Route/Ruta 4 | Palm Desert Mall - Palm Springs
- 5** Route/Ruta 5 | Desert Hot Springs - CSUSB (PDC) - Palm Desert Mall
- 6** Route/Ruta 6 | Coachella - Via Fred Waring - Palm Desert Mall
- 7** Route/Ruta 7 | Bermuda Dunes - Indian Wells - La Quinta
- 8** Route/Ruta 8 | North Indio - Coachella - Thermal/Mecca
- 9** Route/Ruta 9 | North Shore - Mecca - Oasis
- 10** Route/Ruta 10 | Indio - CSUSB (PDC) - CSUSB

- San Bernardino Transit Center (SBTC) / Metrolink
- Transfer Points/Puntos de Transferencia
- Routes at Transfer Points/Rutas en Puntos de Transferencia
- Transit Hub

Map not to scale. See individual route maps for Microtransit Zones.  
 Mapa no está a escala real. Ver mapas individuales para las zonas de viaje compartido.

## 10 COMMUTER LINK

INDIO - CSUSB (PDC) - THOUSAND PALMS TRANSIT HUB - BEAUMONT  
 CSUSB - SAN BERNARDINO TRANSIT CENTER (SBTC)/METROLINK



760.343.3451 | SunLine.org



**SunLine Transit Agency**

**ACRONYMS LIST OF TRANSPORTATION TERMS**

Last Updated: 02/18/2025

<b>#</b>		CTA	California Transit Association
5307	FTA Section 5307: Urbanized Area Formula Grants	CTC	California Transportation Commission
5310	FTA Section 5310: Enhanced Mobility of Seniors & Individuals with Disabilities	CTSA	Consolidated Transportation Services Agency
		<b>D</b>	
5311	FTA Section 5311: Formula Grants for Rural Areas	DBE	Disadvantaged Business Enterprise
5339	FTA Section 5339: Bus and Bus Facilities Formula Grants	DC	Direct Current
		DRS	Demand Response Service
<b>A</b>		DOT	Department of Transportation
A&E	Architect and Engineering	DPSS	Department of Public Social Services
AC	Alternating Current	<b>E</b>	
ATU	Amalgamated Transit Union	EA	Environmental Assessment
ADA	Americans with Disabilities Act	EAM	Enterprise Asset Management
AHSC	Affordable Housing and Sustainable Communities	EEO	Equal Employment Opportunity
APC	Automated Passenger Counting	EIR	Environmental Impact Report
APTA	American Public Transit Association	EPA	Environmental Protection Agency
ATP	Active Transportation Program	ERMA	Employee Risk Management Authority
AVL	Automated Vehicle Location System	ERP	Enterprise Resource Planning
AFC	Automatic Fare Collection	ETO	Earned Time Off
AVA	Automatic Voice Announcement	EFP	Electronic Fare Payment
AV	Autonomous Vehicle	EV	Electric Vehicle
		<b>F</b>	
<b>B</b>		FCEB/FCB	Fuel Cell Electric Bus
BAFO	Best and Final Offer	FFY	Federal Fiscal Year
Bar	Metric Unit of Pressure (100 kPa)	FHWA	Federal Highway Administration
BEB	Battery Electric Bus	FMCSA	Federal Motor Carrier Safety Administration
BRT	Bus Rapid Transit	FTA	Federal Transit Administration
BUILD	Better Utilizing Investments to Leverage Development	FTE	Full-Time Equivalent
<b>C</b>		FTIP	Federal Transportation Improvement Program
CAD	Computer-Aided Dispatch	FM/LM	First Mile/Last Mile
CalACT	California Association for Coordinated Transportation	FY	Fiscal Year
CalOES	California Office of Emergency Services	<b>G, H, I, J, &amp; K</b>	
CalSTA	California State Transportation Agency	GTFS	General Transit Feed Specifications
Caltrans	California Department of Transportation	GTFS-RT	General Transit Feed Specifications Realtime
Cap-and-Trade	California's Cap-and-Trade Program	GFI	Gen-fare Industries Farebox
CARB	California Air Resources Board	GGE	Gallons of Gas Equivalent
CBA	Collective Bargaining Agreement	GHG	Greenhouse Gas
CEC	California Energy Commission	GPS	Global Positioning System
CEQA	California Environmental Quality Act	GTFS	General Transit Feed Specification
CFR	Code of Federal Regulations	H2	Hydrogen
CI	Carbon Intensity	HOV	High-Occupancy Vehicle
CIG	Capital Investment Grants Program	ICT	Innovative Clean Transit
CIP	Capital Improvement Program	ITS	Intelligent Transport System
CMAQ	Congestion Mitigation and Air Quality Improvement Program	IFB	Invitation for Bid
CNG	Compressed Natural Gas	IJA	Infrastructure Investment and Jobs Act
CO	Change Order	ITS	Intelligent Transportation Systems
CO2	Carbon Dioxide	JPA	Joint Powers Authority
CVAG	Coachella Valley Association-Government	Kg	Kilogram
CTAA	Community Transportation Association of America	kPa	Kilopascal (1,000 Pa)
COA	Comprehensive Operational Analysis	KPI	Key Performance Indicator
COLA	Cost of Living Adjustment	kW	Kilowatts (1,000 watts)
COVID-19	Coronavirus	Kwh	Kilowatt Hour
		<b>L</b>	
CRRSAA	Coronavirus Response and Relief Supplemental Appropriations Act	LCFS	Low Carbon Fuel Standard
CSUSB	California State University, San Bernardino	LCTOP	Low Carbon Transit Operations Program
		LH2	Liquid Hydrogen

LOI	Letter of Intent	S RTP	Short Range Transit Plan
LOS	Level of Service	STA	State Transit Assistance Fund
LOU	Letter of Understanding	STBG	Surface Transportation Block Grant Program
Low No	Low or No Carbon Emissions Program	STIP	State Transportation Improvement Program
L RTP	Long Range Transportation Plan	<b>T</b>	
L TF	Local Transportation Fund	TAC	Technical Advisory Committee
<b>M, N, &amp; O</b>		TAM	Transit Asset Management
MCI	Motor Coach Industries	TCP	Transit Capital Priorities
MCO	Motor Coach Operator	TDA	Transportation Development Act
Measure A	Measure A Funding	TDM	Transportation Demand Management
MOD	Mobility on Demand	TIP	Transportation Improvement Program
MOU	Memorandum of Understanding	TIRCP	Transit and Intercity Rail Capital Program
MPO	Metropolitan Planning Organization	TNC	Transportation Network Company
MSDS	Material Safety Data Sheet	TOD	Transit-Oriented Development
mW	Megawatt (1,000,000 watts)	TSI	Transportation Safety Institute
mWh	Megawatt Hour	TSP	Transit Signal Priority
NAAQS	National Ambient Air Quality Standards	<b>U, V, W, X, Y, Z</b>	
NEPA	National Environmental Policy Act	USDOT	United States Department of Transportation
NIMS	National Incident Management System	UPT	Unlinked Passenger Trips
NOFA	Notice of Funding Availability	VCR	Vehicle Condition Report
NOFO	Notice of Funding Opportunity	VMT	Vehicle Miles Traveled
NTD	National Transit Database	VTO	Vacation Time Off
NTP	Notice to Proceed	YTD	Year to Date
NTSB	National Transportation Safety Board	ZEB	Zero-Emission Bus
O&M	Operations and Maintenance		
OSHA	Occupational Safety and Health Administration		
OBC	On-Board Communication		
OTP	On-Time Performance		
<b>P &amp; Q</b>			
Pa	Pascal		
PPRH	Passenger Per Revenue Hour		
PIS	Passenger Information System		
PAC	Public Advisory Committee		
PEM	Proton Exchange Membrane (H2)		
PEPRA	Public Employer Pension Reform Act		
PERMA	Public Entity Risk Management Authority		
PLD	Paid Leave Day		
PM	Preventative Maintenance		
PNR	Park & Ride		
PO	Purchase Order		
PPE	Personal Protective Equipment		
PPRH	Passengers per Revenue Hour		
PSI	Pounds per Square Inch		
PTASP	Public Transportation Agency Safety Plan		
<b>R &amp; S</b>			
RAISE	Rebuilding American Infrastructure with Sustainability and Equity		
RCTC	Riverside County Transportation Commission		
RFP	Request for Proposals		
RFQ	Request for Quotation		
RFS	Renewable Fuel Standard		
RIN	Renewable Identification Number		
RVH	Revenue Vehicle Hours		
RVM	Revenue Vehicle Miles		
SBTC	San Bernardino Transit Center		
SCAG	Southern California Association of Governments		
SGR	State of Good Repair		
SMR	Steam Methane Reforming (H2)		
SMS	Safety Management System		
SOP	Standard Operating Procedure		
SOW	Scope of Work		

**SunLine Transit Agency****CONSENT CALENDAR**

DATE: June 25, 2025

**APPROVE**TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of Checks \$1,000 and Over Report April 2025

Summary:

The Checks \$1,000 and Over Report lists all of the checks processed at the Agency with a value of over \$1,000 for a given month.

- The table below identifies the checks \$50,000 and over in the month of April which required signature from the Chair or Vice Chair.

<b>Vendor</b>	<b>Check #</b>	<b>Amount</b>
<i>A-Z Bus Sales Inc.</i>	699505	\$798,527.60

Recommendation:

Approve.

**SunLine Transit Agency  
Checks \$1,000 and Over  
April 2025**

<b>Vendor Filed As Name</b>	<b>Description</b>	<b>Check #</b>	<b>Payment Date</b>	<b>Payment Amount</b>
A-Z BUS SALES INC	WIP-Replacement Paratransit Buses- Project Acct#2205-00	699505	04/22/2025	798,527.60
CALPERS	Group Health Premiums	699572	04/30/2025	443,296.03
U.S. BANK INSTITUTIONAL TRUST-WESTERN	Pension Deposit	699495	04/16/2025	88,658.00
U.S. BANK INSTITUTIONAL TRUST-WESTERN	Pension Deposit	699636	04/30/2025	86,758.29
U.S. BANK INSTITUTIONAL TRUST-WESTERN	Pension Deposit	699361	04/02/2025	85,242.09
IMPERIAL IRRIGATION DIST	Utilities	699463	04/16/2025	69,637.95
SO CAL GAS CO.	Utilities	699411	04/09/2025	56,523.76
ANEW RNG, LLC	Utilities	699304	04/02/2025	54,414.06
ANEW RNG, LLC	Utilities	699515	04/23/2025	54,329.04
METLIFE	Supplement Benefits LTD/STD/LIFE/Dental Ins Prem	699507	04/22/2025	47,713.86
METLIFE	Supplement Benefits LTD/STD/LIFE/Dental Ins Prem	699508	04/22/2025	47,578.19
NFI PARTS	WIP-Special Tool & Equipment purchase-Project Acct#2412-01	699367	04/09/2025	43,372.78
SOUTHERN CALIFORNIA REGIONAL TRANSIT	Center of Excellence Workshop	699357	04/02/2025	38,000.00
ROBERT HALF	Temporary Help	699406	04/09/2025	33,600.00
GENFARE, LLC	Inventory Repair Parts	699385	04/09/2025	32,913.51
MICHELIN NORTH AMERICA, INC.	Lease Tires Services	699334	04/02/2025	32,659.53
TRUGUARD SECURITY SERVICES, INC	Security Guard Services	699494	04/16/2025	23,501.40
HELIXSTORM	Contracted Services	699462	04/16/2025	23,470.10
RUSH TRUCK CENTERS OF CALIFORNIA, INC.	Inventory Repair Parts	699352	04/02/2025	21,440.53
VERIZON WIRELESS	Wireless Telephone Service	699499	04/16/2025	20,478.42
NFI PARTS	Inventory Repair Parts	699420	04/16/2025	18,720.45
NFI PARTS	Inventory Repair Parts	699298	04/02/2025	18,704.54
YELLOW CAB OF THE DESERT	SunRide Ride Share Expenses	699504	04/16/2025	18,639.36
YELLOW CAB OF THE DESERT	SunRide Ride Share Expenses	699418	04/09/2025	18,523.53
YELLOW CAB OF THE DESERT	SunRide Ride Share Expenses	699366	04/02/2025	18,474.61
CMD CORPORATION	Inventory Repair Parts	699311	04/02/2025	17,868.06
ROBERT HALF	Temporary Help	699480	04/16/2025	17,183.53
CDW GOVERNMENT, INC	WIP-Information Technology-Project Acct#2418-12	699377	04/09/2025	16,021.51
MOORE & ASSOCIATES, INC.	WIP-Feasibility Studies- Project Acct#2514-02	699393	04/09/2025	13,059.42
CV STRATEGIES	Contracted Services	699581	04/30/2025	12,973.75
ROBERT HALF	Temporary Help	699622	04/30/2025	12,876.40
CDW GOVERNMENT, INC	WIP-Information Technology-Project Acct#2418-12	699308	04/02/2025	12,852.13
INSIGHT STRATEGIES INC	Consulting	699464	04/16/2025	12,675.00
VIRGINKAR AND ASSOCIATES, INC.	WIP-Upgrade for CAD/AVL System-Project Acct#2309-00	699500	04/16/2025	12,132.50
JOSEPH LYNN FRIEND	Consulting Services	699536	04/23/2025	11,130.00
INTEGRATED CRYOGENIC SOLUTIONS LLC	Contracted Services	699597	04/30/2025	10,773.89
GLOBAL INDUSTRIAL	WIP-Fixed Assets-Misc. Equipment-Project Acct#2310-03	699387	04/09/2025	10,770.69
SONSRAY FLEET SERVICES	Inventory Repair Parts	699416	04/09/2025	10,695.43
TOWNSEND PUBLIC AFFAIRS, INC	Contract Services-General	699490	04/16/2025	9,750.00

**SunLine Transit Agency  
Checks \$1,000 and Over  
April 2025**

<b>Vendor Filed As Name</b>	<b>Description</b>	<b>Check #</b>	<b>Payment Date</b>	<b>Payment Amount</b>
AVAIL TECHNOLOGIES	Inventory Repair Parts	699516	04/23/2025	9,472.85
DYNAMIC BUILDING MAINTENANCE INC	Janitorial Services	699447	04/16/2025	9,349.00
LORMAN EDUCATION SERVICES	Staff Development	699340	04/02/2025	9,050.00
SHAW YODER ANTWIH SCHMELZER & LANGE, INC	Consulting	699486	04/16/2025	9,000.00
RUSH TRUCK CENTERS OF CALIFORNIA, INC.	Inventory Repair Parts	699481	04/16/2025	8,992.59
NAPA AUTO PARTS	Inventory Repair Parts	699472	04/16/2025	8,887.74
GENFARE, LLC	Inventory Repair Parts	699320	04/02/2025	8,784.43
TRANSPORTATION MANAGEMENT & DESIGN, DNSFILTER, INC.	Consulting Computer/Network Software Agreement	699493 699446	04/16/2025 04/16/2025	8,472.75 8,160.00
PRUDENTIAL OVERALL SUPPLY	Uniforms	699403	04/09/2025	8,109.10
THE GREATER COACHELLA VALLEY CHAMBER OF COAST COMPRESSOR COMPANY	Miscellaneous Expense Inventory Repair Parts	699415 699376	04/09/2025 04/09/2025	8,050.00 7,783.97
JE STRATEGIES LLC	Consulting	699466	04/16/2025	7,500.00
SAFETY-KLEEN CORPORATION	Contract Svc-Haz Waste Removal	699353	04/02/2025	7,361.68
PALM SPRINGS MOTORS, INC.	Inventory Repair Parts	699343	04/02/2025	7,149.42
ALLIED REFRIGERATION, INC	Freon & Coolant	699422	04/16/2025	7,056.07
ROBERT HALF	Temporary Help	699547	04/23/2025	6,925.59
A-1 ALTERNATIVE FUEL SYSTEMS/A-1 AUTO	Inventory Repair Parts	699512	04/23/2025	6,741.05
JOSEPH LYNN FRIEND	Contracted Services	699600	04/30/2025	6,480.00
AMALGAMATED TRANSIT UNION	Union Dues	699301	04/02/2025	6,351.64
AMALGAMATED TRANSIT UNION	Union Dues	699424	04/16/2025	6,351.64
AMALGAMATED TRANSIT UNION	Union Dues	699564	04/30/2025	6,276.64
GILLIG LLC	Inventory Repair Parts	699322	04/02/2025	6,109.98
FRANKLIN TRUCK PARTS, INC	Inventory Repair Parts	699455	04/16/2025	6,107.95
PALM SPRINGS MOTORS, INC.	Inventory Repair Parts	699612	04/30/2025	6,029.04
TOKEN TRANSIT, INC	Mobile Ticketing Commission	699634	04/30/2025	5,947.20
DAVID RZEPINSKI CONSULTING	Consulting	699314	04/02/2025	5,918.75
JOSEPH LYNN FRIEND	Contracted Services	699537	04/23/2025	5,700.00
ROBERT HALF	Temporary Help	699350	04/02/2025	5,613.20
RUSH TRUCK CENTERS OF CALIFORNIA, INC.	Inventory Repair Parts	699625	04/30/2025	5,379.46
TYLER TECHNOLOGIES, INC.	Contracted Services	699360	04/02/2025	5,368.00
KIRK'S AUTOMOTIVE, INC.	Inventory Repair Parts	699330	04/02/2025	5,061.02
TPX COMMUNICATIONS	Communication Service	699491	04/16/2025	5,013.65
IMPERIAL IRRIGATION DIST	Utilities	699535	04/23/2025	4,864.03
AMERICAN MOVING PARTS	Inventory Repair Parts	699428	04/16/2025	4,631.13
TOKEN TRANSIT, INC	Mobile Ticketing Commission	699489	04/16/2025	4,591.84
ANDREA CARTER & ASSOCIATES	Marketing & Communication Services	699429	04/16/2025	4,567.50
FORENSIC DRUG TESTING SERVICES	Alcohol & Drug Testing	699528	04/23/2025	4,482.35
IMPERIAL IRRIGATION DIST	Utilities	699506	04/22/2025	4,409.20

**SunLine Transit Agency  
Checks \$1,000 and Over  
April 2025**

<b>Vendor Filed As Name</b>	<b>Description</b>	<b>Check #</b>	<b>Payment Date</b>	<b>Payment Amount</b>
BURKE, WILLIAMS & SORENSEN, LLP	Legal Service	699571	04/30/2025	4,406.60
NFI PARTS	Inventory Repair Parts	699562	04/30/2025	4,379.30
DECALS BY DESIGN, INC.	Inventory Repair Parts	699443	04/16/2025	4,311.43
THE LEFLORE GROUP LLC	WIP-Liquid Hydrogen Refueling -Project Acct#2211-02	699407	04/09/2025	4,287.66
AMAZON CAPITAL SERVICES, INC	Office Supplies	699425	04/16/2025	4,116.02
GRAINGER	Inventory Repair Parts	699388	04/09/2025	4,003.01
JIM'S DESERT RADIATOR AND A/C SERVICE	Inventory Repair Parts	699445	04/16/2025	3,844.19
PRUDENTIAL OVERALL SUPPLY	Uniforms	699402	04/09/2025	3,626.15
TRANSIT AND COACH PARTS	Inventory Repair Parts	699492	04/16/2025	3,491.10
TRI-STATE MATERIALS, INC.	WIP-Facility Improvement Project-Project Acct#2203-02	699635	04/30/2025	3,452.05
KAMINSKY PRODUCTIONS, INC	Staff Development	699601	04/30/2025	3,415.00
ROMAINE ELECTRIC CORP.	Inventory Repair Parts	699351	04/02/2025	3,347.70
CHARTER COMMUNICATIONS	Utilities	699413	04/09/2025	3,282.72
CALIFORNIA DEPARTMENT OF TAX & FEE	Quarterly Used Sale Tax Jan-Mar 2025	699434	04/16/2025	3,135.00
US BANK VOYAGER FLEET SYSTEMS	Unleaded/Diesel Fuel	699497	04/16/2025	3,040.82
TRANSIT AND COACH PARTS	Inventory Repair Parts	699359	04/02/2025	2,903.86
CNTY OF RIVERSIDE DEPT OF ENVIRONMENTAL	Permits & Licenses	699578	04/30/2025	2,794.00
DESERT AIR CONDITIONING, INC.	Air Conditioning Expense	699316	04/02/2025	2,790.41
CMD CORPORATION	Inventory Repair Parts	699439	04/16/2025	2,680.09
VALLEY OFFICE EQUIPMENT, INC.	Copier Service	699557	04/23/2025	2,595.76
SECTRAN SECURITY INC.	Bank Adjustment Fees	699354	04/02/2025	2,575.78
JESSUP AUTO PLAZA	Inventory Repair Parts	699544	04/23/2025	2,538.02
FRONTIER COMMUNICATIONS	Utilities- OPS Bldg	699530	04/23/2025	2,500.00
NFI PARTS	Inventory Repair Parts	699510	04/23/2025	2,486.10
CALIFORNIA STATE DISBURSEMENT UNIT	Garnishment	699435	04/16/2025	2,373.82
CALIFORNIA STATE DISBURSEMENT UNIT	Garnishment	699573	04/30/2025	2,373.82
CALIFORNIA STATE DISBURSEMENT UNIT	Garnishment	699307	04/02/2025	2,373.82
HOME DEPOT CREDIT SERVICES	Facility Maintenance	699533	04/23/2025	2,334.37
THE LEFLORE GROUP LLC	WIP-Liquid Hydrogen Refueling -Project Acct#2211-02	699548	04/23/2025	2,308.74
C V WATER DISTRICT	Utilities	699520	04/23/2025	2,304.52
BURRTEC WASTE & RECYCLING SERVICES	Trash Service	699374	04/09/2025	2,271.13
SC FUELS	Lubricants- Oil	699408	04/09/2025	2,248.53
SC FUELS	Lubricants- Oil	699483	04/16/2025	2,246.01
DS AIR	Materials & Supplies	699309	04/02/2025	2,120.30
AMAZON CAPITAL SERVICES, INC	Facility Maintenance	699302	04/02/2025	2,084.57
SAFETY-KLEEN CORPORATION	Contract Svc-Haz Waste Removal	699482	04/16/2025	1,979.26
N/S CORPORATION	Facility Maintenance	699541	04/23/2025	1,915.25
YELLOW CAB OF THE DESERT	Taxi Voucher Program	699640	04/30/2025	1,890.05
PREMIER SECURITY INC	Inventory Repair Parts	699617	04/30/2025	1,834.98

**SunLine Transit Agency  
Checks \$1,000 and Over  
April 2025**

<b>Vendor Filed As Name</b>	<b>Description</b>	<b>Check #</b>	<b>Payment Date</b>	<b>Payment Amount</b>
BALLARD POWER SYSTEMS	Inventory Repair Parts	699371	04/09/2025	1,777.88
AMAZON CAPITAL SERVICES, INC	Facility Maintenance	699513	04/23/2025	1,760.36
TOTAL CARE WORK INJURY CLINIC	Medical Exam & Testing	699503	04/16/2025	1,695.00
TOKEN TRANSIT, INC	Mobile Ticketing Commission	699555	04/23/2025	1,681.12
RWC GROUP	Inventory Repair Parts	699457	04/16/2025	1,646.86
BURRTEC WASTE & RECYCLING SERVICES	Trash Service	699373	04/09/2025	1,606.40
GLOBAL INDUSTRIAL	Plumbing Expenses	699461	04/16/2025	1,604.40
EDITH HERNANDEZ	Reimbursement Expense	699449	04/16/2025	1,543.04
SECTRAN SECURITY INC.	Bank Adjustment Fees	699550	04/23/2025	1,529.55
ENTECH OIL INC	Lubricants- Oil	699451	04/16/2025	1,526.60
GRAINGER	Inventory Repair Parts	699532	04/23/2025	1,509.37
LAWRENCE ROLL UP DOORS, INC	Emergency Preparedness Supplies	699469	04/16/2025	1,455.43
HIRERIGHT, LLC	Background Service	699378	04/09/2025	1,425.95
FIESTA FORD, INC.	Inventory Repair Parts	699383	04/09/2025	1,420.95
BALLARD POWER SYSTEMS	Inventory Repair Parts	699431	04/16/2025	1,374.89
FASTENAL COMPANY	Shop Supplies	699523	04/23/2025	1,358.93
CDW GOVERNMENT, INC	Computer/Network Software Agreement	699437	04/16/2025	1,348.20
MOHAWK MFG & SUPPLY CO	Inventory Repair Parts	699540	04/23/2025	1,334.35
PRUDENTIAL OVERALL SUPPLY	Uniforms	699476	04/16/2025	1,326.63
MOHAWK MFG & SUPPLY CO	Inventory Repair Parts	699606	04/30/2025	1,307.16
PIEDMONT PLASTICS, INC.	Bus Stop Supplies	699345	04/02/2025	1,292.22
LANGUAGELINE SOLUTIONS	Translation Services	699468	04/16/2025	1,282.16
OPW FUELING COMPONENTS	Inventory Repair Parts-SunFuels	699611	04/30/2025	1,251.56
ON THE FLY TERMITE AND PEST CONTROL	Pest Control Services	699398	04/09/2025	1,192.00
ROMAINE ELECTRIC CORP.	Inventory Repair Parts	699624	04/30/2025	1,185.25
ABSOLUTE SELF STORAGE	Storage Rental	699561	04/30/2025	1,152.00
GANNETT CALIFORNIA LOCALIQ	Public Notice	699458	04/16/2025	1,141.68
TEAMSTERS LOCAL 1932	Union Dues	699632	04/30/2025	1,097.32
TEAMSTERS LOCAL 1932	Union Dues	699488	04/16/2025	1,095.70
TEAMSTERS LOCAL 1932	Union Dues	699358	04/02/2025	1,094.89
4IMPRINT, INC.	Material & Supplies	699419	04/16/2025	1,086.10
QUADIENT FINANCE USA, INC.	Postage	699404	04/09/2025	1,085.00
N/S CORPORATION	Contracted Services	699471	04/16/2025	1,066.29
CDW GOVERNMENT, INC	Computer/Network Software Agreement	699518	04/23/2025	1,065.70
GRAINGER	Electrical Expenses	699325	04/02/2025	1,055.85
ALPHA MEDIA LLC	Advertising	699423	04/16/2025	1,050.00
SOCALGAS	Utilities	699412	04/09/2025	1,008.91
MARCOS MENDOZA	Reimbursement Expense	699332	04/02/2025	1,000.00

**SunLine Transit Agency  
Checks \$1,000 and Over  
April 2025**

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
<b>Total Checks Over \$1,000</b>	\$2,801,138.04			
<b>Total Checks Under \$1,000</b>	\$34,521.54			
<b>Total Checks</b>	\$2,835,659.58			

**SunLine Transit Agency**

**CONSENT CALENDAR**

DATE: June 25, 2025

**APPROVE**

TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of Credit Card Statement for April 2025

Summary:

The attached report summarizes the Agency's credit card expenses for April 2025. The report summarizes transactions for the credit cards which align with the statement closing date of April 30, 2025.

Recommendation:

Approve.

**SunLine Transit Agency Visa Credit Card Statement**

**Closing Date: 04/30/2025**

**Name on Card: Ray Stevens (Procurement Card)**

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
1	03/31/25	4/1/2025	CTC-VIS	California Air Resources Board (CARB) Clean Truck Reporting Vehicle Fees		\$ 249.44
2	03/31/25	4/1/2025	Fred Pryor Career Track	Pryor Learning Solutions Training		\$ 229.00
3	03/31/25	4/1/2025	CTC-VIS	California Air Resources Board (CARB) Clean Truck Reporting Vehicle Processing Fees		\$ 7.46
4	04/01/25	4/2/2025	Portland Compressor	Grease and Grease Gun for Air Compressors		\$ 1,589.32
5	04/01/25	4/3/2025	APTA	APTA Legislative Conference for Mona B. - Registration Fee		\$ 1,075.00
6	04/01/25	4/3/2025	United Airlines	American Bus Benchmarking Workshop for Dylan Narz - Flight Expense		\$ 1,125.52
7	04/01/25	4/3/2025	PayPal	Power of Partnership Conference for Mona B. - Registration Fee		\$ 416.48
8	04/01/25	4/3/2025	United Airlines	American Bus Benchmarking Workshop for Marina Blackstone - Flight Expense		\$ 1,022.32
9	04/01/25	4/3/2025	United Airlines	American Bus Benchmarking Workshop for Dylan Narz - Flight Expense		\$ 30.99
10	04/01/25	4/3/2025	United Airlines	American Bus Benchmarking Workshop for Marina Blackstone - Flight Expense		\$ 27.99
11	04/02/25	4/4/2025	Marriott Hotel	American Bus Benchmarking Workshop for Marina Blackstone - Lodging Expense		\$ 941.64
12	04/02/25	4/4/2025	Marriott Hotel	American Bus Benchmarking Workshop for Dylan Narz - Lodging Expense		\$ 941.64
13	04/03/25	4/4/2025	IATR Global	International Association of Transportation Regulators (IATR) Annual Conference Jill Plaza and Anna Julianelli - Registration Fee (Paid by SunLine Transit Agency Credit Card but Charged to SunLine Regulatory Administration)		\$ 2,200.00
14	04/04/25	4/4/2025	2025 State of 4th District	State of the 4th District & CV Economic Update General Admission Fees		\$ 120.00
15	04/04/25	4/7/2025	Westin Hotel	APTA Mobility Conference for Isaac Rodriguez - Lodging Expense		\$ 1,223.69

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
16	04/04/25	4/7/2025	Westin Hotel	APTA Mobility Conference & Bus Rodeo for Patricia A. De Mora - Lodging Expense		\$ 1,891.93
17	04/04/25	4/7/2025	Westin Hotel	APTA Mobility Conference & Bus Rodeo for Isabel Vizcarra - Lodging Expense		\$ 1,807.73
18	04/04/25	4/7/2025	Westin Hotel	APTA Mobility Conference & Bus Rodeo for Juan Colon - Lodging Expense		\$ 1,088.13
19	04/07/25	4/8/2025	Marriott Hotel	APTA Mobility Conference & Bus Rodeo for Shawn Craycraft - Lodging Expense		\$ 1,434.80
20	04/07/25	4/9/2025	Southwest Airlines	Safety Management System (SMS) Principles in Transit for Richard Powers - Flight Expense		\$ 450.36
21	04/07/25	4/9/2025	APTA	APTA Mobility Conference for Isaac Rodriguez - Registration Fee		\$ 1,275.00
22	04/09/25	4/11/2025	JW Marriott	APTA Mobility Conference & Bus Rodeo for Shawn Craycraft - Lodging Credit	\$ (0.05)	
23	04/09/25	4/11/2025	JW Marriott	APTA Mobility Conference & Bus Rodeo for Mike Hayes - Lodging Expense		\$ 1,434.75
24	04/09/25	4/11/2025	Westin Hotel	APTA Mobility Conference & Bus Rodeo for Isabel Vizcarra - Lodging Expense		\$ 36.14
25	04/09/25	4/11/2025	JW Marriott	APTA Mobility Conference & Bus Rodeo for Mark Perry - Lodging Expense		\$ 1,476.28
26	04/11/25	4/14/2025	Sam's Club	Pallet of Water for Cooling Station		\$ 287.04
27	04/11/25	4/14/2025	TSI	SMS Principles in Transit for Richard Powers - Registration Fee		\$ 60.00
28	04/15/25	4/16/2025	American Airlines	IATR Annual Conference for Jill Plaza - Flight Expense (Seat)		\$ 50.56
29	04/15/25	4/16/2025	American Airlines	IATR Annual Conference for Ana Maria Julianelli - Flight Expense (Seat)		\$ 50.56
30	04/15/25	4/16/2025	American Airlines	IATR Annual Conference for Ana Maria Julianelli - Flight Expense		\$ 412.36
31	04/15/25	4/16/2025	American Airlines	IATR Annual Conference for Jill Plaza - Flight Expense		\$ 412.36
32	04/17/25	4/21/2025	United Airlines	ZEBRA & Roundtable Conference for Shawn Craycraft - Flight Expense		\$ 572.82
33	04/17/25	4/21/2025	United Airlines	ZEBRA & Roundtable Conference for Mark Perry -Flight Expense		\$ 608.19
34	04/19/25	4/21/2025	Stadia Maps, Inc.	Tile Mapping for Radio Replacement Project		\$ 80.00
35	04/21/25	4/22/2025	Windmill City Screen	System Map Tote Bags for Marketing Supplies		\$ 6,726.29

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
36	04/22/25	4/23/2025	Expedia	APTA Legislative Conference for Edith Hernandez - Service Fee		\$ 10.43
37	04/22/25	4/24/2025	United Airlines	APTA Legislative Conference for Edith Hernandez - Flight Expense		\$ 472.59
38	04/22/25	4/24/2025	County of Riverside	CalFire Permit Service Fee for Upgrade to Agency West Entrances at Division I		\$ 8.07
39	04/22/25	4/24/2025	American Airlines	APTA Legislative Conference for Edith Hernandez - Flight Expense		\$ 22.33
40	04/22/25	4/24/2025	County of Riverside	CalFire Permit for Upgrade to Agency West Entrances at Division I		\$ 354.00
41	04/22/25	4/24/2025	American Airlines	APTA Legislative Conference for Edith Hernandez - Flight Expense		\$ 138.19
42	04/23/25	4/25/2025	APTA	APTA Legislative Conference for Edith Hernandez - Registration Fee		\$ 1,275.00
43	04/24/25	4/28/2025	Delta Airlines	Transit Tech Executive Summit for Paul Mattern - Flight Expense		\$ 786.96
44	04/29/25	4/30/2025	Fred Pryor Career track	Pryor Learning Solutions Training for Carlos Gonzalez		\$ 229.00
Totals:					\$ (0.05)	\$ 34,652.36



Reporting Period : 4/1/2025 - 4/30/2025

**Statement Summary**

<b>Name</b>	Ray Stevens	<b>Company</b>	Sunline Transit Agency
<b>Account #</b>	XXXX-XXXX-XXXX-████	<b>Currency</b>	US Dollar
<b>Reporting Period</b>	4/1/2025 - 4/30/2025		

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
1 3/31/2025	4/1/2025	Ctc-Vis 279-842-9957, CA					249.44
		Purchase Ctc-Vis	General Ledger Code: 5099900002				
		PR 22819 - Clean Truck Check Reporting Mar. 2025				Maintenance Department - GL 00-22-2099900004	
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2 3/31/2025	4/1/2025	Fredpryor Careertrack 800-5563012, KS					229.00
		Purchase Fredpryor Careertrack	General Ledger Code: 5090200001				
		PR 22805 - 2025-2026 Pryor Learning Solutions Training				Strategic Department - GL 00-39-5099900001	
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3 3/31/2025	4/1/2025	Ctc-Vis *svc 279-842-9957, MD					7.46
		Purchase Ctc-Vis *svc	General Ledger Code: 5099900002				
		PR 22819 - Clean Truck Check Reporting Mar. 2025				Maintenance Department - GL 00-22-5099900004	
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4 4/1/2025	4/2/2025	Portland Compressor 503-2350200, OR					1,589.32
		Purchase Portland Compressor	General Ledger Code: 5099900002				
		PR 22803 - Grease for Air Compressors (PD05)				Maintenance Department - GL 00-22-5049900021	
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5 4/1/2025	4/3/2025	Apta 202-4964800, DC					1,075.00
		Purchase Apta	General Ledger Code: 5090100000				
		Legislative Conference for Mona Babauta				Executive Department - GL 00-40-5090200000	

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
6 4/1/2025	4/3/2025	United United.Com, TX					1,125.52
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Dylan Narz – American Bus Benchmarking Group Workshop - Flight Charge		Transportation Department - GL 00-11-5090200000			
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7 4/1/2025	4/3/2025	Paypal San Jose, TX					416.48
		Purchase Paypal	General Ledger Code: 5099900002				
		Power of Partnership Conference for Mana Babauta		Executive Department - GL 00-40-5090200000			
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8 4/1/2025	4/3/2025	United United.Com, TX					1,022.32
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Marina Blackstone – American Bus Benchmarking Group Workshop - Flight Charge		Transportation Department - GL 00-11-5090200000			
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9 4/1/2025	4/3/2025	United United.Com, TX					30.99
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Dylan Narz – American Bus Benchmarking Group Workshop - Flight Seat Charge		Transportation Department - GL 00-11-5090200000			
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10 4/1/2025	4/3/2025	United United.Com, TX					27.99
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Marina Blackstone – American Bus Benchmarking Group Workshop - Flight Seat Charge		Transportation Department - GL 00-11-5090200000			
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11 4/2/2025	4/4/2025	Ac Hotel By Marriott D Dayton, OH					941.64
		Purchase Ac Hotel By Marriott D	General Ledger Code: 5090200000				
		Approved Travel for Marina Blackstone – American Bus Benchmarking Group Workshop - Lodging Charge		Transportation Department - GL 00-11-5090200000			
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Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
12	4/2/2025	4/4/2025	Ac Hotel By Marriott D Dayton, OH				941.64
			Purchase Ac Hotel By Marriott D	General Ledger Code: 5090200000			
			Approved Travel for Dylan Narz – American Bus Benchmarking Group Workshop - Lodging Charge	Transportation Department - GL 00-11-5090200000			
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13	4/3/2025	4/4/2025	Iatr.Global Iatr.Global/A, NY				2,200.00
			Purchase Iatr.Global	General Ledger Code: 5090100000			
			Approved Travel for Jill Plaza and Anna Maria Julianelli– IATR Annual Conference - Conference Charge	Planing Department - GL 99-96-5090200000			
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14	4/4/2025	4/4/2025	Eb *2025 State Of The 801-413-7200, CA				120.00
			Purchase Eb *2025 State Of The	General Ledger Code: 5039903800			
			PR 22826 - 2025 State of the 4th District & CV Economic Update -General Admission	Executive Department - GL 00-40-5099900002 - Planning Dept 00-49-5090200000			
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15	4/4/2025	4/7/2025	Westin Austin Downtown Austin, TX				1,223.69
			Purchase Westin Austin Downtown	General Ledger Code: 5090200000			
			Approved Travel for Isaac Rodriguez – APTA Mobility Conference - Lodging Charge	Planning Department - GL 00-49-5090200000			
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16	4/4/2025	4/7/2025	Westin Austin Downtown Austin, TX				1,891.93
			Purchase Westin Austin Downtown	General Ledger Code: 5090200000			
			Approved Travel for Patricia Arellano De Mora – Mobility Conference & Bus Rodeo - Lodging Charge	Transportation Department - GL 00-11-5090200000			
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17	4/4/2025	4/7/2025	Westin Austin Downtown Austin, TX				1,807.73
			Purchase Westin Austin Downtown	General Ledger Code: 5090200000			
			Approved Travel for Isabel Vizcarra - Mobility Conference & Bus Rodeo - Lodging Charge	Transportation Department - GL 00-11-5090200000			
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Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
18 4/4/2025	4/7/2025	Westin Austin Downtown Austin, TX					1,088.13
Purchase Westin Austin Downtown			General Ledger Code: 5090200000				
Approved Travel for Juan Colon – International Bus Roadeo - Lodging Charge				Transportation Department - GL 00-11-5090200000			
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19 4/7/2025	4/8/2025	Jw Marriott Austin Austin, TX					1,434.80
Purchase Jw Marriott Austin			General Ledger Code: 5090200000				
Approved Travel for Shawn Craycraft – APTA Mobility & Bus Roadeo - Lodging Charge				SunFuels Department - GL 00-10-5090200000			
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20 4/7/2025	4/9/2025	Southwes 800-435-9792, TX					450.36
Purchase Southwes			General Ledger Code: 5090200000				
Approved Travel for Richard Powers – SMS Principles in Transit - Flight Charge				Safety Department - GL 00-15-5090200000			
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21 4/7/2025	4/9/2025	Apta 202-4964800, DC					1,275.00
Purchase Apta			General Ledger Code: 5090100000				
Approved Travel for Isaac Rodriguez – APTA Mobility Conference - Conference Fee				Planning Department - GL 00-49-5090200000			
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22 4/9/2025	4/11/2025	Jw Marriott Austin Austin, TX					-0.05
Credit Voucher Jw Marriott Austin			General Ledger Code: 5090200000				
Approved Travel for Shawn Craycraft – APTA Mobility & Bus Roadeo - Lodging Credit				SunFuels Department - GL 00-10-5090200000			
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23 4/9/2025	4/11/2025	Jw Marriott Austin Austin, TX					1,434.75
Purchase Jw Marriott Austin			General Ledger Code: 5090200000				
Approved Travel for Mike Hayes – APTA Mobility & Bus Roadeo - Lodging Charge				Maintenance Department - GL 00-22-5090200000			
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Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
24 4/9/2025	4/11/2025	Westin Austin Downtown Austin, TX					36.14
		Purchase Westin Austin Downtown	General Ledger Code: 5090200000				
		Approved Travel for Isabel Vizcarra - Mobility Conference & Bus Roadeo - Lodging Advance Fee		Transportation Department - GL 00-11-5090200000			
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25 4/9/2025	4/11/2025	Jw Marriott Austin Austin, TX					1,476.28
		Purchase Jw Marriott Austin	General Ledger Code: 5090200000				
		Approved Travel for Mark Perry – APTA Mobility & Bus Roadeo - Lodging Charge		Maintenance Department - GL 00-22-5090200000			
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26 4/11/2025	4/14/2025	Samsclub #6609 Palm Desert, CA					287.04
		Purchase Samsclub #6609	General Ledger Code: 5099900002				
		PR 22893 - Pallet of Water for Cooling Station		Safety Department - GL 00-15-5049900009			
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27 4/11/2025	4/14/2025	Tsi 405-954-9742, OK					60.00
		Purchase Tsi	General Ledger Code: 5099900002				
		Approved Travel for Richard Powers – SMS Principles in Transit - Registration Fee		Safety Department - GL 00-15-5090200000			
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28 4/15/2025	4/16/2025	American Air Fort Worth, TX					50.56
		Purchase American Air	General Ledger Code: 5090200000				
		Approved Travel for Jill Plaza – IATR Annual Conference - Seat Charge		Planing Department - GL 99-96-5090200000			
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29 4/15/2025	4/16/2025	American Air Fort Worth, TX					50.56
		Purchase American Air	General Ledger Code: 5090200000				
		Approved Travel for Anna Maria Julianelli – IATR Annual Conference - Seat Charge		Planing Department - GL 99-96-5090200000			
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Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
30	4/15/2025	4/16/2025	American Air Fort Worth, TX				412.36
	Purchase American Air		General Ledger Code: 5090200000				
	Approved Travel for Anna Maria Julianelli – IATR Annual Conference - Flight Charge					Planing Department - GL 99-96-5090200000	
31	4/15/2025	4/16/2025	American Air Fort Worth, TX				412.36
	Purchase American Air		General Ledger Code: 5090200000				
	Approved Travel for Jill Plaza – IATR Annual Conference - Flight Charge					Planing Department - GL 99-96-5090200000	
32	4/17/2025	4/21/2025	United United.Com, TX				572.82
	Purchase United		General Ledger Code: 5090200000				
	Approved Travel for Shawn Craycraft – ZEBRA & Roundtable - Flight Charge					SunFuels - GL 00-10-5090200000	
33	4/17/2025	4/21/2025	United United.Com, TX				608.19
	Purchase United		General Ledger Code: 5090200000				
	Approved Travel for Mark Perry – ZEBRA Conference & Roundtable					Maintenance Department - GL 00-22-5090200000	
34	4/19/2025	4/21/2025	Stadia Maps, Inc Stadiamaps.Co, MI				80.00
	Purchase Stadia Maps, Inc		General Ledger Code: 5030300011				
	PR 22555 - Radio Project - Tile Server - Cost is to cover a 12-month term at \$80-month.					Radio Project - GL 00-00-1110109236	
35	4/21/2025	4/22/2025	Py *windmill City Screen 760-7745252, CA				6,726.29
	Purchase Py *windmill City Screen		General Ledger Code: 5039900003				
	PR 22911 - System Map Tote Bags					Marketing Department - GL 00-31-5090201000	

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
36	4/22/2025	4/23/2025	Expedia 73087457613067 Expedia.Com, WA				10.43
	Purchase Expedia 73087457613067		General Ledger Code: 5090200000				
	Approved Travel for Edith Hernandez – APTA Legislative Conference - Service Fee			Executive Department - GL 00-40-5090200000			
37	4/22/2025	4/24/2025	United United.Com, TX				472.59
	Purchase United		General Ledger Code: 5090200000				
	Approved Travel for Edith Hernandez – APTA Legislative Conference - Flight Charge			Executive Department - GL 00-40-5090200000			
38	4/22/2025	4/24/2025	Co Riverside Transportati 951-9550533, IN				8.07
	Purchase Co Riverside Transportati		General Ledger Code: 5099900002				
	PR 22777 - Cal Fire Permit FPCBP2500101			Performance Department - GL 00-00-1110109239			
39	4/22/2025	4/24/2025	American Air Fort Worth, TX				22.33
	Purchase American Air		General Ledger Code: 5090200000				
	Approved Travel for Edith Hernandez – APTA Legislative Conference - Seat Charge			Executive Department - GL 00-40-5090200000			
40	4/22/2025	4/24/2025	Co Of Riverside Transport 951-9551800, CA				354.00
	Purchase Co Of Riverside Transport		General Ledger Code: 5099900002				
	PR 22777 - Cal Fire Permit FPCBP2500101			Performance Department - GL 00-00-1110109239			
41	4/22/2025	4/24/2025	American Air Fort Worth, TX				138.19
	Purchase American Air		General Ledger Code: 5090200000				
	Approved Travel for Edith Hernandez – APTA Legislative Conference - Flight Taxes and Fees			Executive Department - GL 00-40-5090200000			



**SunLine Transit Agency Visa Credit Card Statement**

**Closing Date: 04/30/2025**

**Name on Card: Walter Watcher (Procurement Card)**

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
1	03/31/25	4/1/2025	Eig	Constant Contact Newsletter - Email Campaign Platform Yearly Subscription Renewal		\$ 533.80
2	04/10/25	4/11/2025	Freepik Premium Ye	Stock Photo Yearly Subscription for Marketing - Currency Fee		\$ 1.44
3	04/10/25	4/11/2025	Freepik Premium Ye	Stock Photo Yearly Subscription for Marketing		\$ 144.00
4	04/15/25	4/16/2025	Survey Monkey US	Yearly Subscription for Online Survey Tool		\$ 468.00
5	04/22/25	4/24/2025	Trimble, Inc.	SketchUp Pro. Annual Subscription - Planning Tool		\$ 698.00
Totals:					\$ -	\$ 1,845.24



Reporting Period : 4/1/2025 - 4/30/2025

**Statement Summary**

<b>Name</b>	Walter Watcher	<b>Company</b>	Sunline Transit Agency
<b>Account #</b>	XXXX-XXXX-XXXX-████	<b>Currency</b>	US Dollar
<b>Reporting Period</b>	4/1/2025 - 4/30/2025		

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
1 3/31/2025	4/1/2025	Eig 855-2295506, MA					533.80
		Purchase Eig	General Ledger Code: 5099900002 Fund: 00				

**Constant Contact Newsletter / Email Campaign Platform 2/14/2025-5/15/2025**

**Marketing Department - GL 00-31-5090100000**

2 4/10/2025	4/11/2025						1.44
		Other Debits Currency Conversion Fee	Fund: 00				
		Freepik Stock Photos Yearly Subscription (4/10/2025 - 4/10/2026)	Currency Fee				

Marketing Department - GL 00-31-5030303240

3 4/10/2025	4/11/2025	Fc* Freepik Premium Ye Malaga, AN					144.00
		Purchase Fc* Freepik Premium Ye	General Ledger Code: 5030303260 Fund: 00				
		Freepik Stock Photos Yearly Subscription (4/10/2025 - 4/10/2026)					

Marketing Department - GL 00-31-5030303240

4 4/15/2025	4/16/2025	Surveymonkeyus Www.Surveymon, CA					468.00
		Purchase Surveymonkeyus	General Ledger Code: 5030300011 Fund: 00				

**SurveyMonkey Advantage Annual Subscription (April 15, 2025 – April 14, 2026)**

**Executive Department - GL 00-40-5090100000**

5 4/22/2025	4/24/2025	Trimble Inc 937-2455500, CO					698.00
		Purchase Trimble Inc	General Ledger Code: 5030300011 Fund: 00				
		PR 22930 - SketchUp Pro, Annual Subscription					

Planning Department - GL 00-42-5030300011

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Transaction Count: 5

**Total: 1,845.24**

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**Employee Signature**

**Date**

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**Authorized Approver Signature**

**Date**

SunLine Transit Agency Visa Credit Card Statement

Closing Date: 04/30/2025

Name on Card: Mona Babauta

Trans. Date	Post Date	Reference	Detail - Description	Credits	Charges
1 4/15/2025	4/17/2025	United	United Airlines Roundtrip from Palm Springs, CA to Salt Lake City, UT for Via Transit Executive Summit; Mona Babauta, CEO/General Manager		\$409.27
<b>Credits and Charges:</b>				\$0.00	\$409.27



Reporting Period : 4/1/2025 - 4/30/2025

**Statement Summary**

<b>Name</b>	Mona Babauta	<b>Company</b>	Sunline Transit Agency
<b>Account #</b>	[REDACTED]	<b>Currency</b>	US Dollar
<b>Reporting Period</b>	4/1/2025 - 4/30/2025		

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
1 4/15/2025	4/17/2025	United United.Com, TX					409.27
Purchase United			General Ledger Code: 5090200000				

Transaction Count: 1  
**Total: 409.27**

\_\_\_\_\_  
**Employee Signature** **Date**

\_\_\_\_\_  
**Authorized Approver Signature** **Date**

**SunLine Transit Agency**  
**CONSENT CALENDAR**

DATE: June 25, 2025 **APPROVE**

TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of Monthly Budget Variance Report for April 2025

Summary:

The budget variance report compares revenues and expenses to the respective line item budgets. The report identifies current monthly revenues and expenses as well as fiscal year to date (FYTD) values. The budgetary figures are represented as a straight line budget. Accordingly, the current monthly budget values are calculated by taking 1/12<sup>th</sup> of the annual budget. The FYTD budget values for the month of April 2025 are equal to 10/12<sup>ths</sup> of the yearly budget.

Year to Date Summary

- As of April 30, 2025, the Agency's FYTD revenues are \$473,555 or 11.61% below the FYTD budget.
- As of April 30, 2025, the Agency's FYTD expenditures are \$603,561 or 1.47% below the FYTD budget.

Monthly Spotlight:

- The variance in legal services are primarily due to an increased usage of legal services and increased costs for new firm.

Recommendation:

Approve.

SunLine Transit Agency  
Budget Variance Report  
April 2025

Description	FY25 Total Budget	Current Month			Fiscal Year to Date			
		Actual	Budget	Positive (Negative)	FYTD Actual	FY25 FYTD Budget	Positive (Negative)	Percentage Remaining
<b>Operating Revenues:</b>								
Passenger Revenue	1,816,893	148,918	151,408	(2,489)	1,512,556	1,514,078	(1,521)	16.8%
Other Revenue	3,078,163	266,105	256,514	9,591	2,093,102	2,565,136	(472,034)	32.0%
<b>Total Operating Revenue</b>	<b>4,895,056</b>	<b>415,023</b>	<b>407,921</b>	<b>7,102</b>	<b>3,605,658</b>	<b>4,079,213</b>	<b>(473,555)</b>	<b>26.3%</b>
<b>Operating Expenses:</b>								
Operator & Mechanic Salaries & Wages	11,239,225	861,754	936,602	74,848	8,815,874	9,366,021	550,147	21.6%
Operator & Mechanic Overtime	1,241,785	163,377	103,482	(59,895)	1,467,121	1,034,821	(432,300)	-18.1%
Administration Salaries & Wages	7,861,873	697,866	655,156	(42,709)	6,272,759	6,551,561	278,802	20.2%
Administration Overtime	126,561	23,659	10,547	(13,112)	180,208	105,468	(74,740)	-42.4%
Fringe Benefits	11,105,305	845,480	925,442	79,962	8,403,328	9,254,421	851,094	24.3%
Communications	287,782	(37,707)	23,982	61,688	191,923	239,818	47,895	33.3%
Legal Services	687,176	40,752	57,265	16,513	928,966	572,647	(356,320)	-35.2%
Computer/Network Software Agreement	1,096,582	84,008	91,382	7,374	894,100	913,818	19,719	18.5%
Uniforms	99,824	2,238	8,319	6,080	62,973	83,187	20,214	36.9%
Contracted Services	1,556,640	104,554	129,720	25,166	855,462	1,297,200	441,738	45.0%
Equipment Repairs	26,500	403	2,208	1,806	20,714	22,083	1,370	21.8%
Security Services	168,000	11,960	14,000	2,040	121,800	140,000	18,200	27.5%
Fuel - CNG	1,920,006	141,544	160,001	18,456	1,066,510	1,600,005	533,495	44.5%
Fuel - Hydrogen	1,443,827	231,976	120,319	(111,657)	1,716,741	1,203,189	(513,552)	-18.9%
Tires	234,000	22,030	19,500	(2,530)	202,224	195,000	(7,224)	13.6%
Office Supplies	81,260	5,697	6,772	1,074	53,159	67,717	14,558	34.6%
Travel/Training	248,200	30,975	20,683	(10,292)	192,356	206,833	14,477	22.5%
Repair Parts	2,008,500	125,305	167,375	42,070	1,311,259	1,673,750	362,491	34.7%
Facility Maintenance	87,000	8,945	7,250	(1,695)	49,087	72,500	23,413	43.6%
Electricity - CNG & Hydrogen	1,090,000	51,860	90,833	38,974	484,325	908,333	424,008	55.6%
Natural Gas	2,030,000	108,298	169,167	60,869	1,164,745	1,691,667	526,921	42.6%
Water and Gas	16,000	993	1,333	340	9,243	13,333	4,090	42.2%
Insurance Losses	1,235,000	(101,345)	102,917	204,262	1,595,681	1,029,167	(566,514)	-29.2%
Insurance Premium - Property	200,000	19,055	16,667	(2,388)	193,706	166,667	(27,039)	3.1%
Repair Claims	100,000	-	8,333	8,333	(600)	83,333	83,933	100.6%
Fuel Taxes	124,500	5,955	10,375	4,420	77,536	103,750	26,214	37.7%
Other Expenses	7,164,078	666,711	597,007	(69,704)	6,086,432	5,970,065	(116,366)	15.0%
Self Consumed Fuel	(4,062,246)	(192,821)	(338,521)	(145,700)	(1,840,042)	(3,385,205)	(1,545,163)	54.7%
<b>Total Operating Expenses (Before Depreciation)</b>	<b>49,417,378</b>	<b>3,923,521</b>	<b>4,118,115</b>	<b>194,594</b>	<b>40,577,587</b>	<b>41,181,149</b>	<b>603,561</b>	<b>17.9%</b>
<b>Operating Expenses in Excess of Operating Revenue</b>		<b>\$ (3,508,498)</b>			<b>\$ (36,971,929)</b>			
<b>Subsidies:</b>								
Local	8,419,000	663,443	701,583	38,140	6,991,250	7,015,833	24,584	17.0%
State	30,588,336	2,410,456	2,549,028	138,572	25,400,961	25,490,280	89,319	17.0%
Federal	5,514,986	434,598	459,582	24,984	4,579,718	4,595,822	16,104	17.0%
<b>Total Subsidies</b>	<b>44,522,322</b>	<b>3,508,498</b>	<b>3,710,194</b>	<b>201,696</b>	<b>36,971,929</b>	<b>37,101,935</b>	<b>130,007</b>	<b>17.0%</b>
<b>Net Operating Gain (Loss) After Subsidies</b>	<b>\$ (0)</b>	<b>\$ -</b>			<b>\$ -</b>			

SunLine Transit Agency  
Budget Variance Report  
April 2025

Description	FY25 Total Budget	Current Month			Fiscal Year to Date			
		Actual	Budget	Positive (Negative)	FYTD Actual	FY25 FYTD Budget	Positive (Negative)	Percentage Remaining
<b>Operating Expenses:</b>								
Wages & Benefits	31,574,749	2,592,135	2,631,229	39,094	25,139,289	26,312,291	1,173,002	20.4%
Services	6,903,050	564,440	575,254	10,815	5,605,541	5,752,542	147,000	18.8%
Fuels & Lubricants	3,581,133	378,426	298,428	(79,998)	2,885,916	2,984,278	98,361	19.4%
Tires	234,000	22,030	19,500	(2,530)	202,224	195,000	(7,224)	13.6%
Materials and Supplies	2,607,460	179,116	217,288	38,172	1,734,234	2,172,883	438,649	33.5%
Utilities	3,554,000	188,902	296,167	107,265	1,978,741	2,961,667	982,926	44.3%
Casualty & Liability	3,678,540	100,965	306,545	205,580	3,872,036	3,065,450	(806,586)	-5.3%
Taxes and Fees	124,500	5,955	10,375	4,420	77,536	103,750	26,214	37.7%
Miscellaneous Expenses	1,222,192	84,373	101,849	17,477	922,112	1,018,493	96,381	24.6%
Self Consumed Fuel	(4,062,246)	(192,821)	(338,521)	(145,700)	(1,840,042)	(3,385,205)	(1,545,163)	54.7%
<b>Total Operating Expenses (Before Depreciation)</b>	<b>49,417,378</b>	<b>3,923,521</b>	<b>4,118,115</b>	<b>194,594</b>	<b>40,577,587</b>	<b>41,181,149</b>	<b>603,561</b>	<b>17.9%</b>
<b>Revenues:</b>								
Passenger Revenue	1,816,893	148,918	151,408	(2,489)	1,512,556	1,514,078	(1,521)	16.8%
Other Revenue	3,078,163	266,105	256,514	9,591	2,093,102	2,565,136	(472,034)	32.0%
<b>Total Operating Revenue</b>	<b>4,895,056</b>	<b>415,023</b>	<b>407,921</b>	<b>7,102</b>	<b>3,605,658</b>	<b>4,079,213</b>	<b>(473,555)</b>	<b>26.3%</b>
<b>Net Operating Gain (Loss)</b>		<b>\$ (3,508,498)</b>			<b>\$ (36,971,929)</b>			
<b>Subsidies:</b>								
Local	8,419,000	663,443	701,583	38,140	6,991,250	7,015,833	24,584	17.0%
State	30,588,336	2,410,456	2,549,028	138,572	25,400,961	25,490,280	89,319	17.0%
Federal	5,514,986	434,598	459,582	24,984	4,579,718	4,595,822	16,104	17.0%
<b>Total Subsidies</b>	<b>44,522,322</b>	<b>3,508,498</b>	<b>3,710,194</b>	<b>201,696</b>	<b>36,971,929</b>	<b>37,101,935</b>	<b>130,007</b>	<b>17.0%</b>
<b>Net Operating Gain (Loss) After Subsidies</b>	<b>\$ (0)</b>	<b>\$ -</b>			<b>\$ -</b>			

**Budget Variance Analysis - SunLine Transit Agency**

**Passenger Revenue**

- Passenger fare revenues are within an acceptable range of the budget.
- As of April, ridership was at 5.2% above FY24 FYTD totals.
- Total system ridership was 118,976 trips above FY24 FYTD amounts.

**Ridership**

	FY24-April	FY25-April	Variance	%Δ
Fixed Route	229,197	229,700	503	0.2%
Paratransit	10,009	9,422	(587)	-5.9%
SunRide	2,045	1,739	(306)	-15.0%
System Total	241,251	240,861	(390)	-0.2%

**Ridership**

	FYTD-FY24	FYTD-FY25	Variance	%Δ
Fixed Route	2,150,172	2,273,033	122,861	5.7%
Paratransit	100,113	93,222	(6,891)	-6.9%
SunRide	18,496	21,502	3,006	16.3%
System Total	2,268,781	2,387,757	118,976	5.2%

**Other Revenue**

- The unfavorable variance in other revenue is primarily due lower emission credit revenue as a result of low credit values.

**Operator & Mechanic Salaries & Wages**

- The favorable variance in operator and mechanic wages are due to vacancies.

**Operator & Mechanic Overtime**

- The unfavorable variance is primarily attributed to overtime for fixed route operators due to vacant positions.

**Administration Salaries & Wages**

- The favorable variance in administrative salaries and wages is primarily attributed to vacancies.

**Administration Overtime**

- The unfavorable variance is primarily attributed to overtime in the Maintenance department to account for vacant positions & premium pay for holidays worked.

**Fringe Benefits**

- Savings in fringe benefit expenditures are associated with vacancies across the Agency.

**Communications**

- Communication expenses are within an acceptable range of the budget.

**Legal Services**

- The unfavorable variance in legal services is primarily due to an increased usage of legal services and increased costs for new firm.

**Computer/Network Software Agreement**

- Software agreement expenditures are dependent on annual renewals of software agreements. Many renewals are completed at the beginning of the fiscal year.

**Uniforms**

- Uniform expenses are within an acceptable range of the budget.

**Contracted Services**

- Savings in contract services costs are primarily attributed to budgeted operating and maintenance costs for the hydrogen stations that were not incurred as of December

**Equipment Repairs**

- Equipment repair expenses are within an acceptable range of the budget.

**Security Services**

- Security services are within an acceptable range of the budget.

**Fuel - CNG**

- The favorable balance in fuel CNG expenses are primarily due to lower costs of natural gas.

**Fuel - Hydrogen**

- The unfavorable balance is due to an accrual of liquid hydrogen and increased deliveries of liquid hydrogen through the new station commissioning.

**Tires**

- Tire expenses are within an acceptable range of the budget.

**Office Supplies**

- Office supply expenses are within an acceptable range of the budget.

**Travel/Training**

- The favorable variance for travel & training savings can be attributed to different times at which training sessions are attended.

**Repair Parts**

- The favorable variance is due to lower than usual repairs for the first half of the fiscal year.

**Facility Maintenance**

- The favorable variance in facility maintenance expenses are primarily due to lower than anticipated YTD expenses for facility repairs.

**Electricity - CNG & Hydrogen**

- Electricity - CNG & Hydrogen expenses are less than anticipated use in the first half of FY25 due to increase utilization of the liquid hydrogen station.

**Natural Gas**

- The positive variance is primarily attributed to lower usage of CNG fixed route vehicles over budgeted estimates for FY25.

**Water and Gas**

- Water and gas expenses are within an acceptable range of the budget.

**Insurance Losses**

- The variance in insurance losses is primarily due to a quarterly reconciliation to estimated losses from the Agency's risk pool.

**Insurance Premium - Property**

- The unfavorable balance is primarily attributed to the increased value of insured assets.

**Repair Claims**

- Repair claim expenses are below budget due to fewer than anticipated collision repairs.

**Fuel Taxes**

- Fuel tax expenses are within an acceptable range of the budget.

**Other Expenses**

- Other expenses are within an acceptable range of the budget.

**Self-Consumed Fuel**

- The variance in primarily due to less than anticipated fuel utilized by the Agency.

**SunLine Transit Agency**  
**CONSENT CALENDAR**

DATE: June 25, 2025 **APPROVE**

TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of Contracts Signed between \$25,000 and \$250,000 for April 2025

Summary:

In accordance with Chapter 2, Section 1.2 of the Procurement Policy, the attached report summarizes SunLine's contracts, purchase orders and amendments signed in excess of \$25,000 and less than \$250,000. This ensures the Board is aware of the obligations entered into under the CEO/General Manager's authority.

There was one (1) purchase order and one (1) agreement executed in April 2025 between \$25,000 and \$250,000:

<b>Vendor</b>	<b>Purpose</b>	<b>Amount</b>
Total Care Work Injury	Occupational Health	\$94,800.00
Helixstorm	Laptops	\$25,584.04

Recommendation:

Approve.

## Contracts Signed Between \$25,000 and \$250,000

April 2025

Vendor	Product/Service	Need	Budgeted	Budgeted Amount	Cost	Type
Total Care Work Injury	Occupational Health Services	Employee Health Services	FY25 FY26 FY27	\$94,800.00	\$94,800.00	Agreement
Helixstorm	6 Laptops	Employee Laptops	FY25	\$25,584.04	\$25,584.04	Purchase Order

**SunLine Transit Agency**  
**CONSENT CALENDAR**

DATE: June 25, 2025

**APPROVE**TO: Finance/Audit Committee  
Board of DirectorsRE: Acceptance of Union & Non-Union Pension Investment Asset Summary  
for April 2025Summary:

The pension asset summary demonstrates the market value of all assets as well as the total asset allocation for SunLine's union and non-union retirement plans. The following table states the target and range values for asset allocations based on the current investment policy:

Asset Class		Target	Range
<b>Growth Assets</b>			
	Domestic Equity	36.0%	16% – 56%
	International Equity	19.0%	0% - 39%
	Other		0% – 20%
<b>Income Assets</b>			
	Fixed Income	45.0%	25% - 65%
	Other	0.0%	0% – 20%
<b>Real Return Assets</b>		0.0%	0% – 20%
<b>Cash Equivalents</b>		0.0%	0% – 20%

For the month of April, SunLine's investments fell within the approved range of investment type for the union and non-union assets.

## Union

Asset Class		Actual	Range
<b>Growth Assets</b>			
	Domestic Equity	28.7%	16% – 56%
	International Equity	17.9%	0% - 39%
	Other	7.5%	0% – 20%
<b>Income Assets</b>			
	Fixed Income	39.9%	25% - 65%
	Other	4.8%	0% – 20%
<b>Real Return Assets</b>		0.0%	0% – 20%

<b>Cash Equivalents</b>	1.2%	0% – 20%
-------------------------	------	----------

## Non-Union

Asset Class		Actual	Range
<b>Growth Assets</b>			
	Domestic Equity	28.7%	16% – 56%
	International Equity	17.7%	0% - 39%
	Other	7.5%	0% – 20%
<b>Income Assets</b>			
	Fixed Income	40.0%	25% - 65%
	Other	4.8%	0% – 20%
<b>Real Return Assets</b>		0.0%	0% – 20%
<b>Cash Equivalents</b>		1.3%	0% – 20%

*Components may not sum to 100.0% due to rounding.*

For the month of April, the market value of assets increased by \$115,000 and \$183,817 for the union and non-union plans, respectively.

## Month to Month Asset Comparison

Month	Market Value - Union	Market Value – Non-Union
March 2025	\$43,443,801	\$43,590,028
April 2025	\$43,558,801	\$43,773,845
Increase (Decrease)	\$115,000	\$183,817

Recommendation:

Approve.



**Detail of Securities Held & Market Analytics**

For the Month Ending **April 30, 2025**

**SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]**

Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
<b>Exchange-Traded Fund - Bond</b>									
ISHARES CORE U.S. AGGREGATE	464287226	8278395	6,446.00	92.76	597,930.32	99.02	638,282.92	40,352.60	1.47
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,307.00	96.40	318,794.80	99.02	327,459.14	8,664.34	0.75
ISHARES CORE U.S. AGGREGATE	464287226	8278395	7,165.00	97.84	701,023.60	99.02	709,478.30	8,454.70	1.63
ISHARES CORE U.S. AGGREGATE	464287226	8278395	16,903.00	98.64	1,667,311.92	99.02	1,673,735.06	6,423.14	3.84
ISHARES CORE U.S. AGGREGATE	464287226	8278395	4,049.00	98.87	400,324.63	99.02	400,931.98	607.35	0.92
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,322.00	99.12	329,276.64	99.02	328,944.44	(332.20)	0.76
<b>Security Type Sub-Total</b>			<b>41,192.00</b>		<b>4,014,661.91</b>	<b>594.12</b>	<b>4,078,831.84</b>	<b>64,169.93</b>	<b>9.37</b>
<b>Exchange-Traded Fund - Equity</b>									
SCHWAB US LARGE-CAP ETF	808524201	17333747	503,068.00	22.54	11,340,829.61	21.93	11,032,281.24	(308,548.37)	25.33
SCHWAB US LARGE-CAP ETF	808524201	17333747	39,046.00	22.81	890,639.26	21.93	856,278.78	(34,360.48)	1.97
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	19,229.00	52.35	1,006,634.30	52.87	1,016,637.23	10,002.93	2.33
VANGUARD TOTAL INTL STOCK	921909768	23836382	6,003.00	61.64	370,024.92	63.86	383,351.58	13,326.66	0.88
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,875.00	51.81	148,953.46	63.86	183,597.50	34,644.04	0.42
VANGUARD TOTAL INTL STOCK	921909768	23836382	46,985.00	63.70	2,992,944.50	63.86	3,000,462.10	7,517.60	6.89
VANGUARD TOTAL INTL STOCK	921909768	23836382	1,834.00	54.44	99,842.96	63.86	117,119.24	17,276.28	0.27
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,586.00	56.52	146,160.72	63.86	165,141.96	18,981.24	0.38
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,586.00	56.19	145,307.34	63.86	165,141.96	19,834.62	0.38
VANGUARD TOTAL INTL STOCK	921909768	23836382	15,690.00	47.86	750,920.27	63.86	1,001,963.40	251,043.13	2.30
VANGUARD TOTAL INTL STOCK	921909768	23836382	3,480.00	52.06	181,168.80	63.86	222,232.80	41,064.00	0.51
<b>Security Type Sub-Total</b>			<b>643,382.00</b>		<b>18,073,426.14</b>	<b>607.61</b>	<b>18,144,207.79</b>	<b>70,781.65</b>	<b>41.66</b>
<b>Money Market Mutual Fund</b>									
FIRST AM GOV OBLIG-Z DTD 01/01/2010 0.000% --	31846V567	351477	516,301.90	1.00	516,301.90	100.00	516,301.90	0.00	1.19
<b>Security Type Sub-Total</b>			<b>516,301.90</b>		<b>516,301.90</b>	<b>100.00</b>	<b>516,301.90</b>	<b>0.00</b>	<b>1.19</b>
<b>Mutual Fund - Bond</b>									
BAIRD CORE PLUS BOND-INST	057071870	7001692	494,959.25	10.77	5,331,185.74	10.17	5,033,735.50	(297,450.24)	11.56

**Detail of Securities Held & Market Analytics**

For the Month Ending **April 30, 2025**

**SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]**

<b>Security Type/Description</b> <b>Dated Date/Coupon/Maturity</b>	<b>CUSIP</b>	<b>Ticker</b>	<b>Shares</b>	<b>Average Cost/Share</b>	<b>Original Cost</b>	<b>Market Price</b>	<b>Market Value</b>	<b>Unreal G/L on Cost</b>	<b>Percentage</b>
<b>Mutual Fund - Bond</b>									
BBH LIMITED DURATION-I	05528X851	7344118	0.03	10.29	0.35	10.45	0.36	0.01	0.00
NUVEEN CORE BOND FUND-R6	87244W607	7580345	289,783.08	9.16	2,653,934.15	9.14	2,648,617.39	(5,316.76)	6.08
PGIM TOTAL RETURN BOND-R6	74440B884	168981	321,369.71	13.18	4,234,618.21	12.00	3,856,436.56	(378,181.65)	8.85
VOYA INTERMEDIATE BOND-R6	92913L569	212412	200,598.22	9.59	1,923,742.61	8.76	1,757,240.43	(166,502.18)	4.03

**Security Type Sub-Total** **1,306,710.29** **14,143,481.06** **50.52** **13,296,030.24** **(847,450.82)** **30.52**

<b>Mutual Fund - Equity</b>									
COLUMBIA SMALL CAP GRW-INST3	19765Y340	195897	9,629.50	28.07	270,300.00	25.65	246,996.62	(23,303.38)	0.57
GLDMN SCHS GQG PRT INTL-INST	38147N293	51973400	36,861.86	19.35	713,335.27	21.56	794,741.71	81,406.44	1.82
HRDNG LVNR INTL EQTY-INST	412295107	175052	19,680.08	28.64	563,700.77	26.72	525,851.72	(37,849.05)	1.21
HRTFRD SCHR EM MRKT EQ-SDR	41665H789	10575468	12,957.31	15.22	197,181.37	17.14	222,088.37	24,907.00	0.51
UNDISC MGRS BEHAV VAL-R6	904504479	1428076	4,861.61	87.23	424,087.81	76.09	369,919.60	(54,168.21)	0.85

**Security Type Sub-Total** **83,990.36** **2,168,605.22** **167.16** **2,159,598.02** **(9,007.20)** **4.96**

<b>Separate Account</b>									
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	16,876.11	1.00	16,876.11	114.70	19,357.63	2,481.52	0.04
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	114.70	51,989.74	6,664.74	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	49,980.00	1.00	49,980.00	114.70	57,329.23	7,349.23	0.13
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	114.70	51,989.74	6,664.74	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	114.70	51,989.74	6,664.74	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	49,000.00	1.00	49,000.00	114.70	56,205.13	7,205.13	0.13
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	114.70	51,989.74	6,664.74	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	49,000.00	1.00	49,000.00	114.70	56,205.13	7,205.13	0.13

**Detail of Securities Held & Market Analytics**

For the Month Ending **April 30, 2025**

SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]									
Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
<b>Separate Account</b>									
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	114.70	51,989.74	6,664.74	0.12
BLACKSTONE INFRASTRUCTURE PRTRNS F 2 L. DTD 10/01/2024 0.000% --	BKSTONE63	SA495	900,000.00	1.00	900,000.00	103.72	933,464.00	33,464.00	2.14
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0090	F_GOLUB	1,101,466.00	1.00	1,101,466.00	128.03	1,410,237.07	308,771.07	3.24
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0090	F_GOLUB	180,000.00	1.00	180,000.00	128.03	230,458.93	50,458.93	0.53
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	204,378.01	1.00	204,378.01	139.08	284,244.76	79,866.75	0.65
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	180,319.43	1.00	180,319.43	139.08	250,784.58	70,465.15	0.58
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	145,309.38	1.00	145,309.38	139.08	202,093.32	56,783.94	0.46
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	252,000.00	1.00	252,000.00	139.08	350,476.46	98,476.46	0.80
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	80,433.93	1.00	80,433.93	139.08	111,865.87	31,431.94	0.25
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	147,000.00	1.00	147,000.00	139.08	204,444.60	57,444.60	0.47
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	309,750.00	1.00	309,750.00	139.08	430,793.98	121,043.98	0.99
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	130,837.59	1.00	130,837.59	139.08	181,966.25	51,128.66	0.42
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	127,930.57	1.00	127,930.57	139.08	177,923.23	49,992.66	0.41
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	105,000.00	1.00	105,000.00	139.08	146,031.86	41,031.86	0.34
<b>Security Type Sub-Total</b>			<b>4,255,906.02</b>		<b>4,255,906.02</b>	<b>2,782.90</b>	<b>5,363,830.73</b>	<b>1,107,924.71</b>	<b>12.31</b>

**Detail of Securities Held & Market Analytics**

For the Month Ending **April 30, 2025**

SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]										
Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage	
<b>Managed Account Sub-Total</b>			6,847,482.57		43,172,382.25	4,302.31	43,558,800.52	386,418.27	100.01	
<b>Securities Sub-Total</b>			\$6,847,482.57		\$43,172,382.25	\$4,302.31	\$43,558,800.52	\$386,418.27	100.01%	
<b>Accrued Interest</b>							\$0.00			
<b>Total Investments</b>							\$43,558,800.52			



**Detail of Securities Held & Market Analytics**

For the Month Ending **April 30, 2025**

**SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]**

<b>Security Type/Description</b>	<b>Dated Date/Coupon/Maturity</b>	<b>CUSIP</b>	<b>Ticker</b>	<b>Shares</b>	<b>Average Cost/Share</b>	<b>Original Cost</b>	<b>Market Price</b>	<b>Market Value</b>	<b>Unreal G/L on Cost</b>	<b>Percentage</b>
<b>Exchange-Traded Fund - Bond</b>										
ISHARES CORE U.S. AGGREGATE		464287226	8278395	4,049.00	98.87	400,324.63	99.02	400,931.98	607.35	0.92
ISHARES CORE U.S. AGGREGATE		464287226	8278395	3,372.00	99.12	334,232.64	99.02	333,895.44	(337.20)	0.76
ISHARES CORE U.S. AGGREGATE		464287226	8278395	17,290.00	98.64	1,705,485.60	99.02	1,712,055.80	6,570.20	3.91
ISHARES CORE U.S. AGGREGATE		464287226	8278395	3,317.00	96.40	319,758.80	99.02	328,449.34	8,690.54	0.75
ISHARES CORE U.S. AGGREGATE		464287226	8278395	6,272.00	92.76	581,790.09	99.02	621,053.44	39,263.35	1.42
ISHARES CORE U.S. AGGREGATE		464287226	8278395	7,146.00	97.84	699,164.64	99.02	707,596.92	8,432.28	1.62
<b>Security Type Sub-Total</b>				<b>41,446.00</b>		<b>4,040,756.40</b>	<b>594.12</b>	<b>4,103,982.92</b>	<b>63,226.52</b>	<b>9.38</b>
<b>Exchange-Traded Fund - Equity</b>										
SCHWAB US LARGE-CAP ETF		808524201	17333747	501,560.00	22.54	11,306,834.27	21.93	10,999,210.80	(307,623.47)	25.13
SCHWAB US LARGE-CAP ETF		808524201	17333747	43,384.00	22.81	989,589.04	21.93	951,411.12	(38,177.92)	2.17
VANGUARD FTSE DEVELOPED ETF		921943858	12373850	17,313.00	52.35	906,332.09	52.87	915,338.31	9,006.22	2.09
VANGUARD TOTAL INTL STOCK		921909768	23836382	46,985.00	63.70	2,992,944.50	63.86	3,000,462.10	7,517.60	6.85
VANGUARD TOTAL INTL STOCK		921909768	23836382	2,470.00	56.52	139,604.40	63.86	157,734.20	18,129.80	0.36
VANGUARD TOTAL INTL STOCK		921909768	23836382	16,886.00	47.86	808,160.58	63.86	1,078,339.96	270,179.38	2.46
VANGUARD TOTAL INTL STOCK		921909768	23836382	6,003.00	61.64	370,024.92	63.86	383,351.58	13,326.66	0.88
VANGUARD TOTAL INTL STOCK		921909768	23836382	3,770.00	52.06	196,266.20	63.86	240,752.20	44,486.00	0.55
VANGUARD TOTAL INTL STOCK		921909768	23836382	2,469.00	56.19	138,733.11	63.86	157,670.34	18,937.23	0.36
VANGUARD TOTAL INTL STOCK		921909768	23836382	1,375.00	54.44	74,855.00	63.86	87,807.50	12,952.50	0.20
VANGUARD TOTAL INTL STOCK		921909768	23836382	2,875.00	51.81	148,953.46	63.86	183,597.50	34,644.04	0.42
<b>Security Type Sub-Total</b>				<b>645,090.00</b>		<b>18,072,297.57</b>	<b>607.61</b>	<b>18,155,675.61</b>	<b>83,378.04</b>	<b>41.47</b>
<b>Money Market Mutual Fund</b>										
FIRST AM GOV OBLIG-Z		31846V567	351477	611,306.61	1.00	611,306.61	100.00	611,306.61	0.00	1.40
DTD 01/01/2010 0.000%	--									
<b>Security Type Sub-Total</b>				<b>611,306.61</b>		<b>611,306.61</b>	<b>100.00</b>	<b>611,306.61</b>	<b>0.00</b>	<b>1.40</b>
<b>Mutual Fund - Bond</b>										
BAIRD CORE PLUS BOND-INST		057071870	7001692	498,399.98	10.74	5,354,051.40	10.17	5,068,727.77	(285,323.63)	11.58

**Detail of Securities Held & Market Analytics**

For the Month Ending **April 30, 2025**

**SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]**

Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
<b>Mutual Fund - Bond</b>									
BBH LIMITED DURATION-I	05528X851	7344118	0.03	10.29	0.35	10.45	0.36	0.01	0.00
NUVEEN CORE BOND FUND-R6	87244W607	7580345	289,783.08	9.16	2,653,934.15	9.14	2,648,617.39	(5,316.76)	6.05
PGIM TOTAL RETURN BOND-R6	74440B884	168981	325,147.34	13.15	4,276,385.22	12.00	3,901,768.10	(374,617.12)	8.91
VOYA INTERMEDIATE BOND-R6	92913L569	212412	202,001.20	9.60	1,938,843.19	8.76	1,769,530.50	(169,312.69)	4.04

**Security Type Sub-Total** **1,315,331.63** **14,223,214.31** **50.52** **13,388,644.12** **(834,570.19)** **30.58**

<b>Mutual Fund - Equity</b>									
COLUMBIA SMALL CAP GRW-INST3	19765Y340	195897	9,529.75	28.07	267,500.00	25.65	244,438.01	(23,061.99)	0.56
GLDMN SCHS GQG PRT INTL-INST	38147N293	51973400	36,802.24	19.35	712,235.01	21.56	793,456.23	81,221.22	1.81
HRDNG LVNR INTL EQTY-INST	412295107	175052	19,647.37	28.63	562,530.78	26.72	524,977.72	(37,553.06)	1.20
HRTFRD SCHR EM MRKT EQ-SDR	41665H789	10575468	12,919.82	15.22	196,610.96	17.14	221,445.78	24,834.82	0.51
UNDISC MGRS BEHAV VAL-R6	904504479	1428076	4,811.24	87.23	419,694.20	76.09	366,087.16	(53,607.04)	0.84

**Security Type Sub-Total** **83,710.42** **2,158,570.95** **167.16** **2,150,404.90** **(8,166.05)** **4.92**

<b>Separate Account</b>									
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	114.70	51,989.73	6,664.73	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	114.70	51,989.73	6,664.73	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	49,000.00	1.00	49,000.00	114.70	56,205.11	7,205.11	0.13
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	16,876.11	1.00	16,876.11	114.70	19,357.63	2,481.52	0.04
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	114.70	51,989.73	6,664.73	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	49,980.00	1.00	49,980.00	114.70	57,329.21	7,349.21	0.13
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	114.70	51,989.73	6,664.73	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	49,000.00	1.00	49,000.00	114.70	56,205.11	7,205.11	0.13

**Detail of Securities Held & Market Analytics**

For the Month Ending **April 30, 2025**

SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]									
Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
<b>Separate Account</b>									
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	114.70	51,989.73	6,664.73	0.12
BLACKSTONE INFRASTRUCTURE PRTRNS F 2 L. DTD 10/01/2024 0.000% --	BKSTONE64	SA496	900,000.00	1.00	900,000.00	103.72	933,464.00	33,464.00	2.13
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0091	F_GOLUB	1,101,466.00	1.00	1,101,466.00	128.03	1,410,237.07	308,771.07	3.22
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0091	F_GOLUB	180,000.00	1.00	180,000.00	128.03	230,458.93	50,458.93	0.53
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	204,378.01	1.00	204,378.01	139.08	284,244.76	79,866.75	0.65
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	80,433.93	1.00	80,433.93	139.08	111,865.87	31,431.94	0.26
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	252,000.00	1.00	252,000.00	139.08	350,476.46	98,476.46	0.80
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	127,930.57	1.00	127,930.57	139.08	177,923.23	49,992.66	0.41
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	180,319.43	1.00	180,319.43	139.08	250,784.58	70,465.15	0.57
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	145,309.38	1.00	145,309.38	139.08	202,093.32	56,783.94	0.46
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	105,000.00	1.00	105,000.00	139.08	146,031.86	41,031.86	0.33
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	130,837.59	1.00	130,837.59	139.08	181,966.25	51,128.66	0.42
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	147,000.00	1.00	147,000.00	139.08	204,444.60	57,444.60	0.47
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	309,750.00	1.00	309,750.00	139.08	430,793.98	121,043.98	0.98
<b>Security Type Sub-Total</b>			<b>4,255,906.02</b>		<b>4,255,906.02</b>	<b>2,782.90</b>	<b>5,363,830.62</b>	<b>1,107,924.60</b>	<b>12.25</b>

**Detail of Securities Held & Market Analytics**

For the Month Ending **April 30, 2025**

SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]									
Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
<b>Managed Account Sub-Total</b>			<b>6,952,790.68</b>		<b>43,362,051.86</b>	<b>4,302.31</b>	<b>43,773,844.78</b>	<b>411,792.92</b>	<b>100.00</b>
<b>Securities Sub-Total</b>			<b>\$6,952,790.68</b>		<b>\$43,362,051.86</b>	<b>\$4,302.31</b>	<b>\$43,773,844.78</b>	<b>\$411,792.92</b>	<b>100.00%</b>
<b>Accrued Interest</b>							<b>\$0.00</b>		
<b>Total Investments</b>							<b>\$43,773,844.78</b>		

**SunLine Transit Agency**  
**CONSENT CALENDAR**

DATE: June 25, 2025

**APPROVE**TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of Ridership Report for April 2025

Summary:

	Monthly Ridership		Monthly Variance	
	Apr-25	Apr-24	Net	Percent
Fixed Route	229,700	229,197	503	0.2%
SunRide	1,739	2,045	(306)	(15.0%)
Taxi Voucher*	156	95	61	64.2%
SunDial	9,422	10,009	(587)	(5.9%)
<b>Total</b>	<b>241,017</b>	<b>241,346</b>	<b>(329)</b>	<b>(0.1%)</b>

\*Taxi Voucher rides are included for the system total; however, they are not NTD reportable.

Yearly Ridership	
<b>Fiscal Year 2025</b>	2,389,227
<b>Fiscal Year 2024</b>	2,270,535
<b>Ridership Increase</b>	<b>118,693</b>

Fiscal year to date system ridership increased by 118,693 rides or 5.23% compared to the previous fiscal year. The baseline of the attached COVID-19 Recovery chart is calendar year 2020, this allows a comparison of three (3) years.

Recommendation:

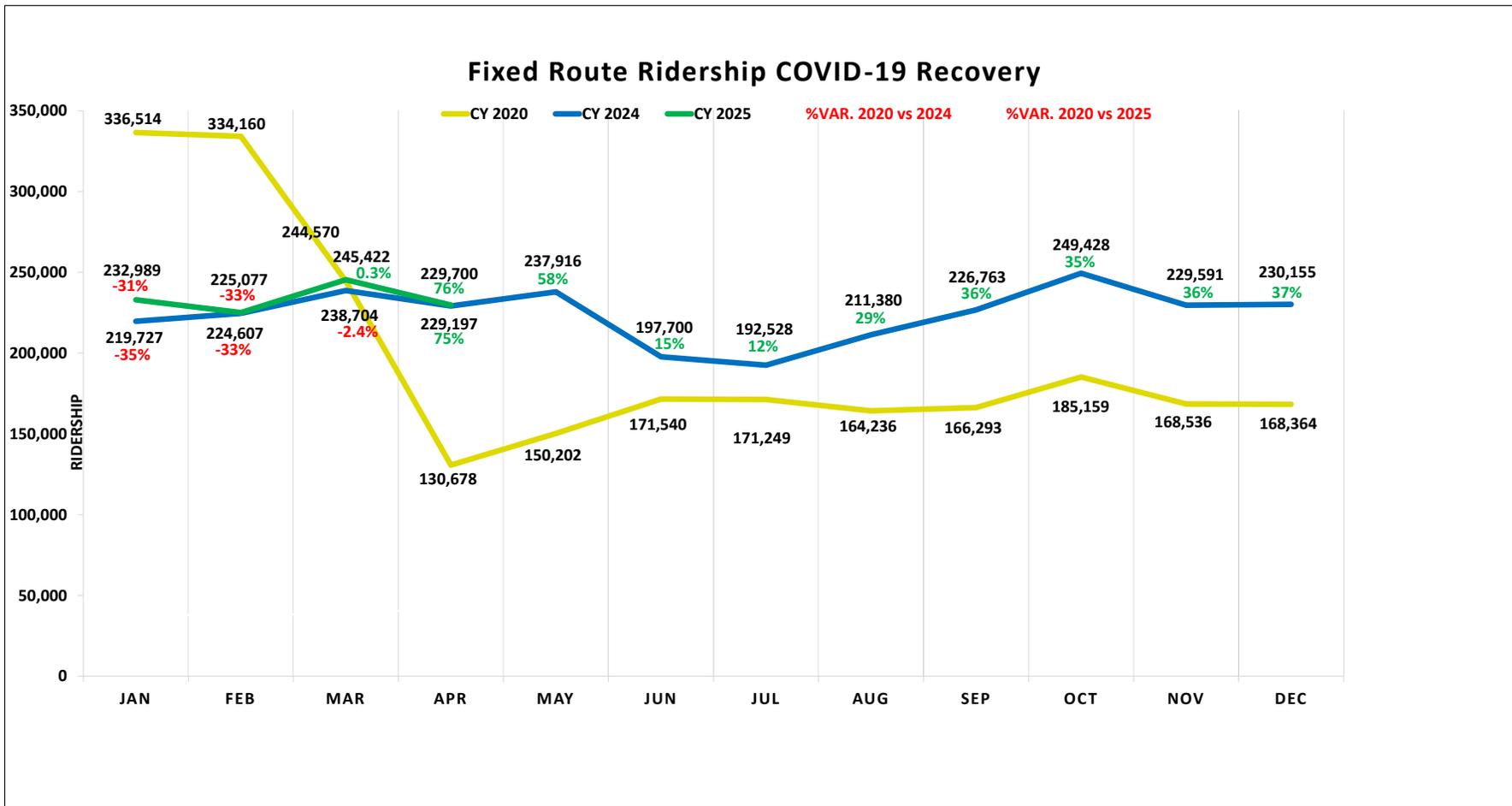
Approve.



## SunLine Transit Agency Monthly Ridership Report April 2025

Fixed Route	Apr 2025	Apr 2024	FY 2025	FY 2024	Monthly KPI		Bikes		Wheelchairs	
			YTD	YTD	Passengers/ Rev. Hours	Passengers/ Rev. Miles	Monthly	FYTD	Monthly	FYTD
Route 1EV	48,819	50,557	498,193	493,485	20.0	1.6	2,024	18,737	213	2,662
Route 1WV	38,417	39,089	383,748	373,180	15.8	1.3	1,091	12,835	228	3,106
Route 2	63,322	62,006	641,394	600,264	18.7	1.4	1,768	17,217	538	5,093
Route 3	7,230	8,294	77,613	70,858	10.1	0.6	265	2,740	92	925
Route 4	20,636	20,441	199,707	185,742	11.5	0.8	597	5,503	165	1,217
Route 5	3,015	2,626	27,063	17,694	5.8	0.3	106	826	23	168
Route 6	5,358	4,931	46,887	31,799	8.9	0.7	169	1,541	46	296
Route 7	8,000	7,944	77,318	76,593	9.8	0.8	397	3,454	7	188
Route 8	16,625	17,809	162,828	154,163	10.9	0.8	552	4,637	60	818
Route 9	5,130	4,788	46,235	46,187	8.1	0.4	65	749	7	117
Route 10	3,933	3,605	33,853	30,317	20.0	0.2	26	2,077	6	345
Route 200 SB	118	79	1,576	1,643	14.0	0.7	-	6	-	1
Route 500 SB	170	378	1,388	2,962	9.4	1.5	-	3	-	-
Route 700 SB/NB	302	214	2,652	3,008	14.7	1.1	-	6	-	-
Route 701 SB/NB	788	646	8,400	7,369	95.6	2.8	-	22	-	7
Route 800 NB	4,175	2,360	33,069	17,693	226.5	12.1	1	7	1	12
Route 801 SB	3,424	2,454	25,990	21,289	178.0	11.9	18	19	7	8
Route 802 SB	51	231	2,157	4,130	14.2	0.6	-	-	-	2
Route 803 NB	187	745	2,963	11,796	25.2	0.2	-	-	-	-
<b>Fixed Route Total</b>	<b>229,700</b>	<b>229,197</b>	<b>2,273,033</b>	<b>2,150,172</b>	<b>14.8</b>	<b>1.0</b>	<b>7,079</b>	<b>70,379</b>	<b>1,393</b>	<b>14,965</b>
SunRide	1,739	2,045	21,502	18,496						
Taxi Voucher	156	95	1,470	1,754						
SunDial	9,422	10,009	93,222	100,113	1.9	0.1				
<b>System Total</b>	<b>241,017</b>	<b>241,346</b>	<b>2,389,227</b>	<b>2,270,535</b>	<b>10.7</b>	<b>0.8</b>				
	Apr-25	Apr-24								
Weekdays:	22	22								
Saturdays:	4	4								
Sundays:	4	4								
<b>Total Days:</b>	<b>30</b>	<b>30</b>								

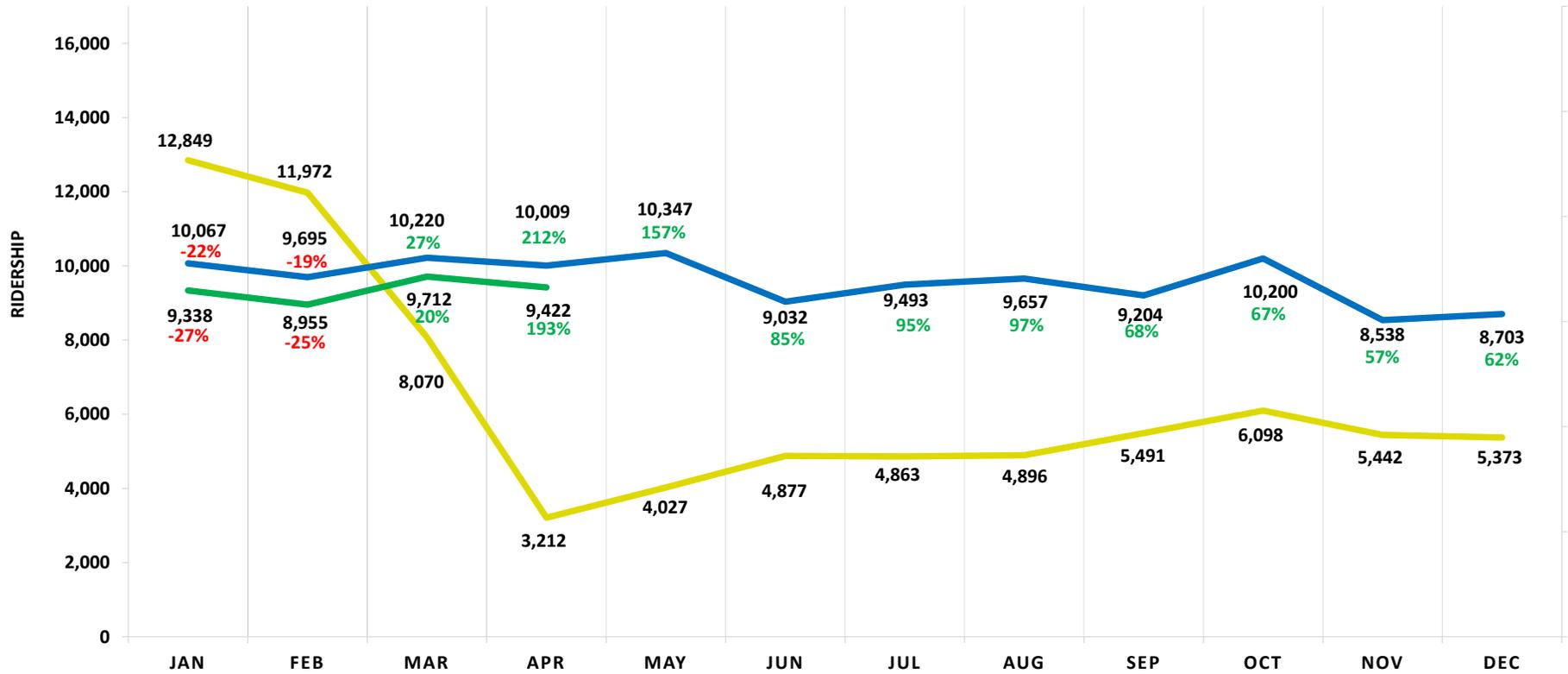
Haul Pass COD contributed with 7,673 rides, CSUSB with 2,406 rides.  
 Mobile Ticketing contributed with 47,521 rides, the total for April 2025 includes 87 paratransit mobile tickets.



The COVID-19 pandemic caused a major national and global disruption with closures of businesses, schools and entertainment venues due to the implementation of national and statewide public health policies. Variances are in red close to their corresponding ridership number. 2024 and 2025 are referring to the baseline of 2020. CY 2020 will remain on the chart since it is the baseline needed to compare ridership recovery for CY 2024 & CY 2025. CY 2021 - CY 2023 have been removed to reflect the two (2) most recent years in recovery.

## Paratransit Ridership COVID-19 Recovery

— CY 2020   
 — CY 2024   
 — CY 2025   
 %VAR. 2020 vs 2024   
 %VAR. 2020 vs 2025



The COVID-19 pandemic caused a major national and global disruption with closures of businesses, schools and entertainment venues due to the implementation of national and statewide public health policies. Variances are in red close to their corresponding ridership number. 2024 and 2025 are referring to the baseline of 2020.

CY 2020 will remain on the chart since it is the baseline needed to compare ridership recovery for CY 2024 & CY 2025. CY 2021 - CY 2023 have been removed to reflect the two (2) most recent years in recovery.

**SunLine Transit Agency**  
**CONSENT CALENDAR**

DATE: June 25, 2025 **APPROVE**

TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of SunDial Operational Notes for April 2025

Summary:

Due to ongoing bus technology upgrades, on-time performance (OTP) reporting will be temporarily paused to ensure data accuracy during system testing and calibration. Reporting will resume once the new system is fully implemented and validated.

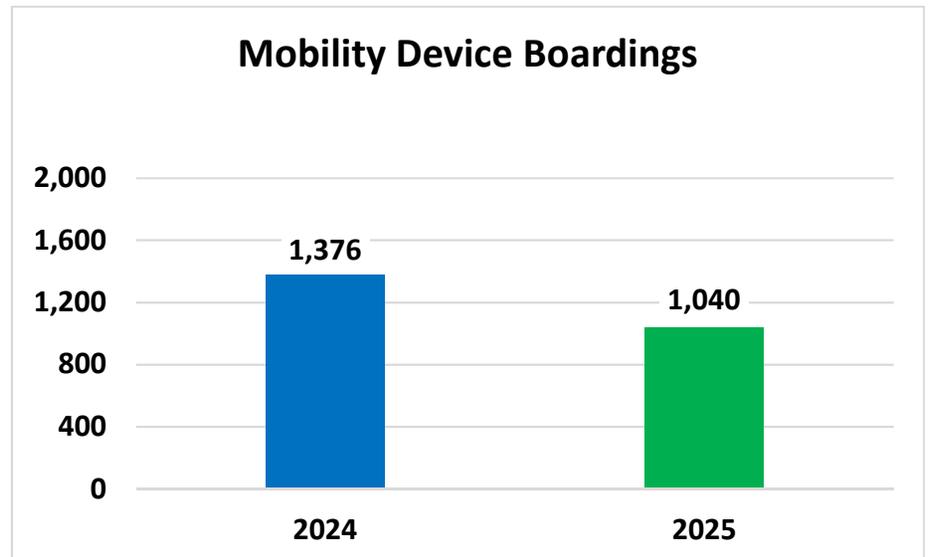
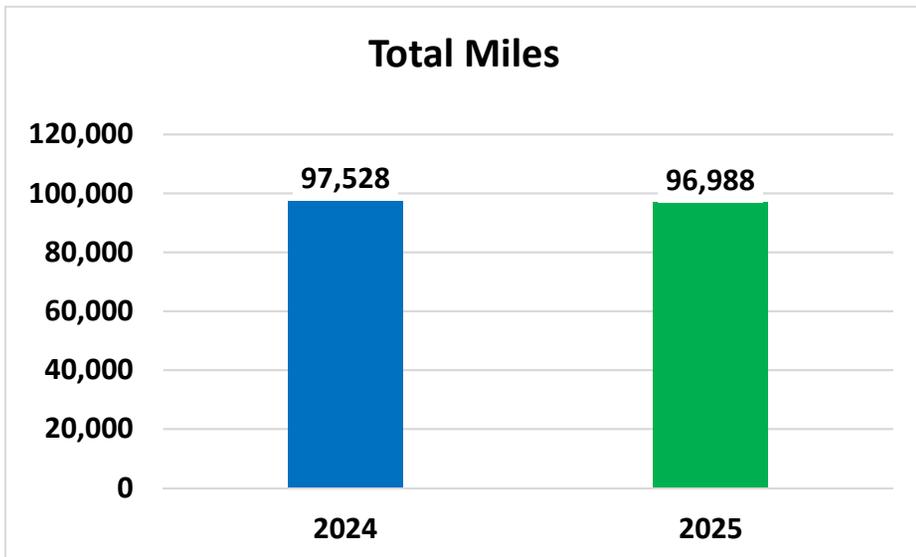
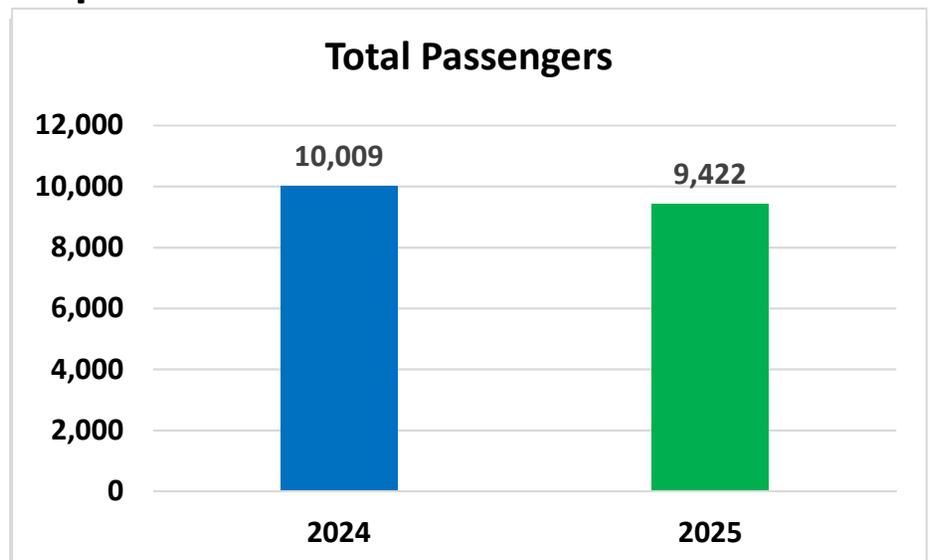
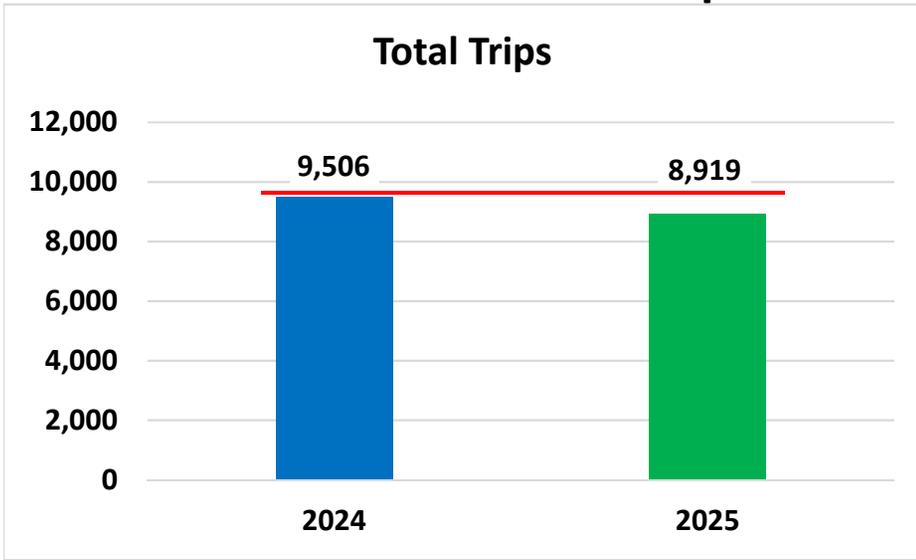
The total number of passengers for the month of April 2025 where 9,422, which is a decrease of 587 passengers or 5.8% when compared to April 2024. Mobility device boardings for April 2025 decreased by 336 or 24.4% when compared to April 2024. During this month, the field supervisors conducted a total of 64 onboard inspections and 63 safety evaluations, which included pre-trip inspections and trailing evaluations. The supervisors have exceeded their monthly on-board evaluations goal of 60 by 4, which is a decrease of 27.2% when compared to April 2024. Similarly, they have also exceeded their safety evaluations goal of 60 by 3, which is a decrease of 27.5% when compared to April 2024.

Recommendation:

Approve.

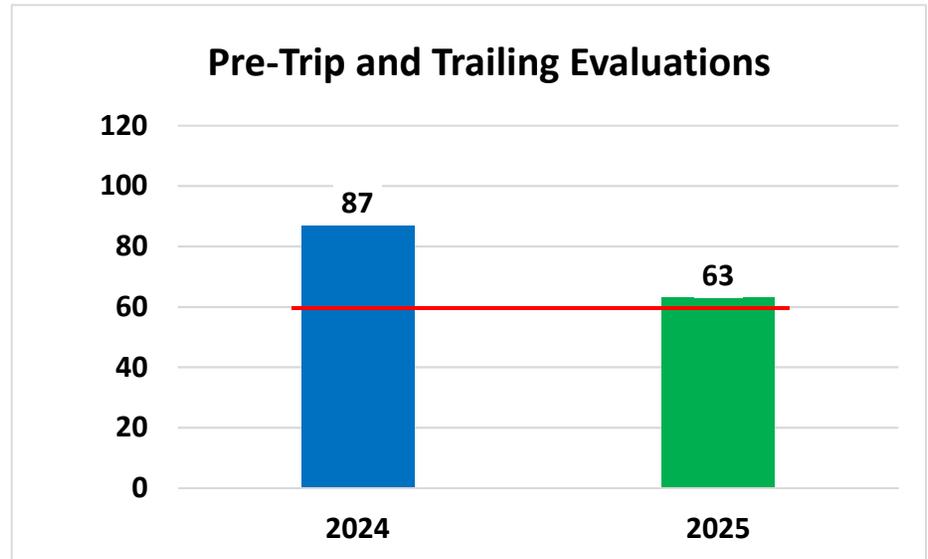
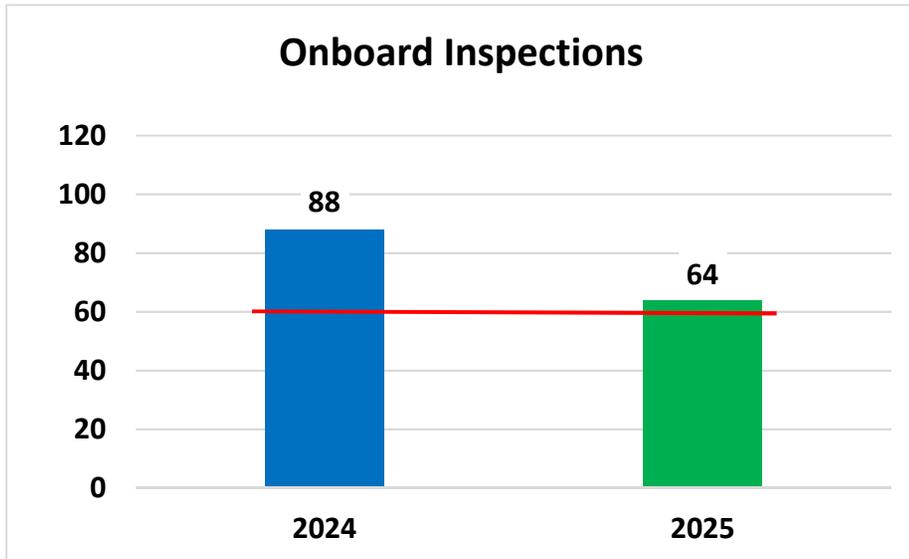
# Paratransit Operational Charts

## April 2024 vs. April 2025



# Paratransit Operational Charts

## April 2024 vs. April 2025



**SunLine Transit Agency**  
**CONSENT CALENDAR**

DATE: June 25, 2025 **APPROVE**

TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of Metrics for April 2025

Summary:

The metrics packet includes data highlighting operator absences, fixed route customer complaints, paratransit customer complaints and advertising revenue. SunRide performance includes system-wide metrics, trip booking method and geo-fence metrics for Desert Hot Springs/Desert Edge, Palm Desert, Coachella, Mecca/North Shore, Indio, Cathedral City, La Quinta and Palm Springs. Included in this packet is ridership data for the mobile ticketing usage of the Token Transit application and the Haul Pass programs with the various High Schools in the Coachella Valley, College of the Desert (COD) and California State University San Bernardino (CSUSB) Palm Desert Campus.

SunRide

April marked the first full month of service from Via, our new turnkey micro transit provider. Ridership dropped 24% systemwide associated with the provider change from RideCo to Via. This is a smaller decline than the 38% seen during the 2021 provider change from TransLoc to RideCo. This is attributed to proactive marketing and communication ahead of the transition.

- New Performance Measures:
  - On-Time Performance: A new chart tracks Deviation ETA vs. Actual Arrival to assess punctuality.
  - Unmet Ride Requests – Seat Unavailable: Defined as either vans being full or unable to reach a rider within 45 minutes.
- April Ridership Highlights:
  - Total Ridership: 1,739 passengers – decrease of 29% with 2,451 passengers compared to March 2025.

- Cathedral City: 115 passengers – decrease of 47% in ridership compared to 216 passengers in March 2025 (due to construction and seats unavailable).
- Coachella: 129 passengers – increase of 5% in ridership compared to 120 passengers in March 2025.
- Desert Hot Springs/Desert Edge: 95 passengers – decrease of 66% in ridership compared to 280 passengers in March 2025 (due to road closures and seat availability).
- Indio: 595 passengers – increase of 8% in ridership compared to 569 passengers in March 2025.
- La Quinta: 19 passengers – increase of 6% in ridership compared to 18 passengers in March 2025.
- Mecca/North Shore: 48 passengers – decrease of 67% in ridership compared to 147 passengers in March 2025 (due to seat availability).
- Palm Desert: 599 passengers – decrease of 22% in ridership compared to 766 passengers in March 2025 (due to seat availability).
- Palm Springs: 139 passengers – decrease of 59% in ridership compared to 335 passengers in March 2025 (due to seat availability).

#### Fixed Route

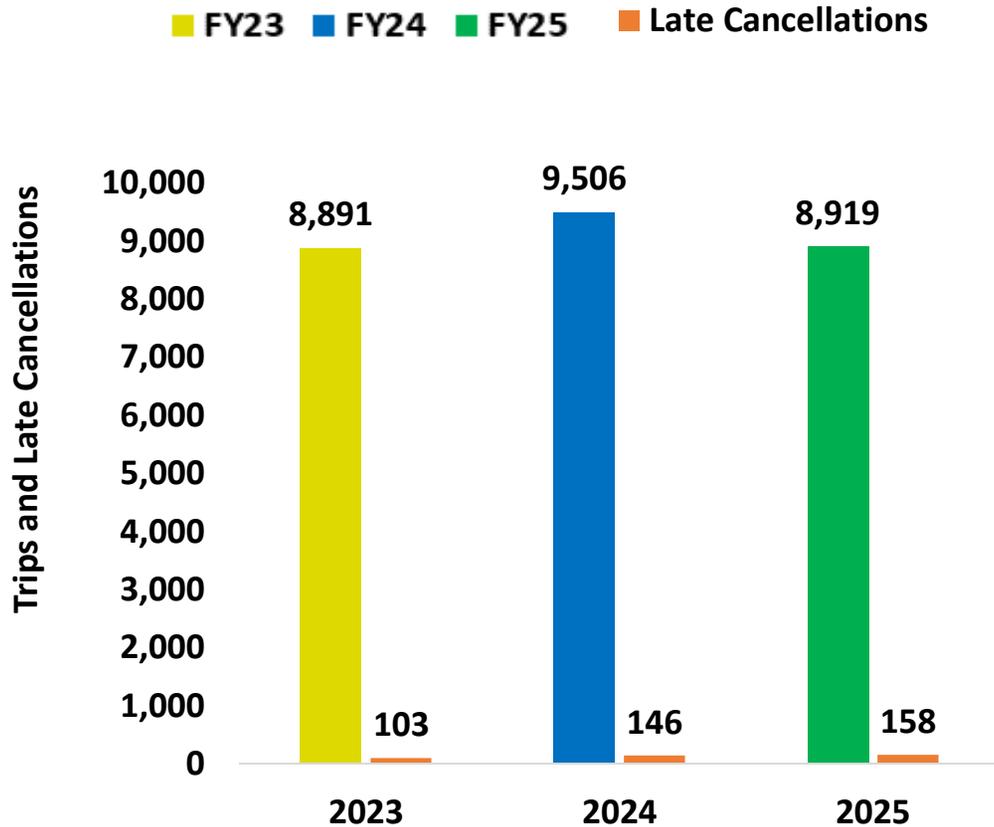
Due to ongoing bus technology upgrades, on-time performance (OTP) reporting will be temporarily paused to ensure data accuracy during system testing and calibration. Reporting will resume once the new system is fully implemented and validated.

- For April 2025, 24% of fixed route operator workforce was absent when compared to April 2024 at 21%.
- For April 2025, the fixed route operator workforce had 127 operators, compared to 147 operators in April 2024.

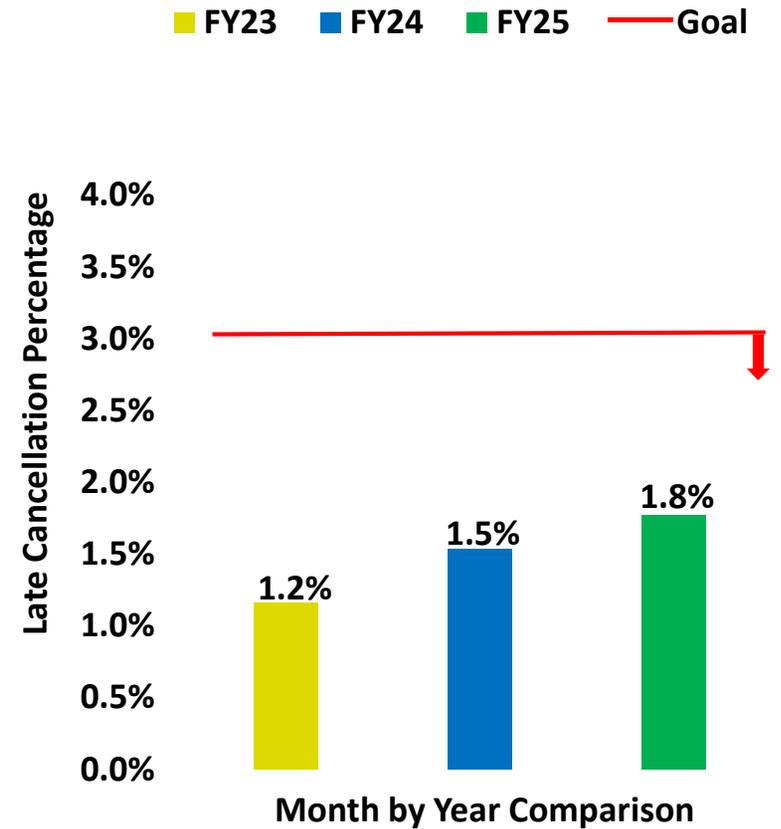
#### Recommendation:

Approve.

## Paratransit Total Trips vs. Late Cancellations April



## Late Cancellations by Percentage



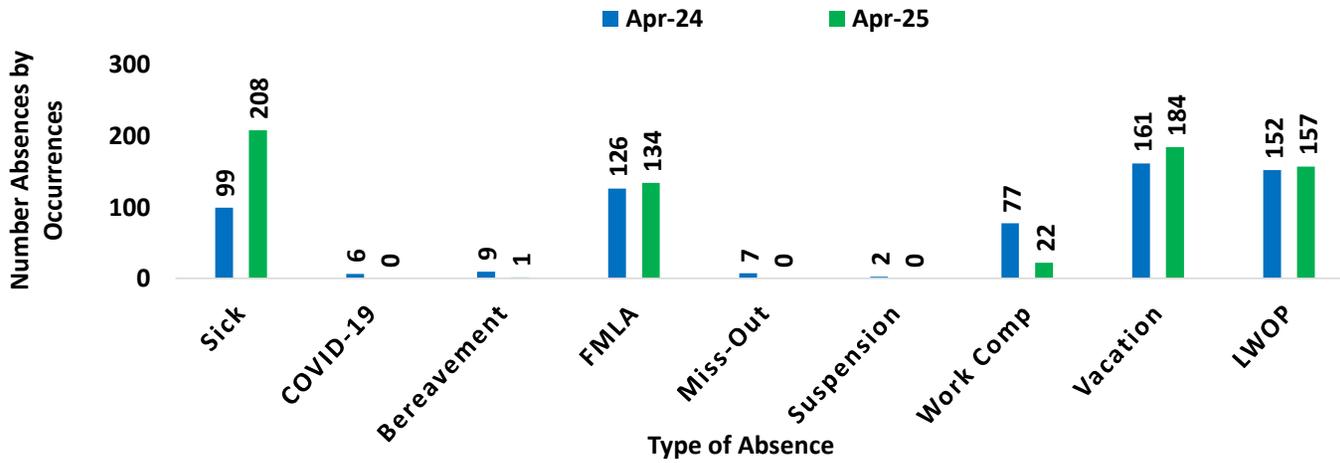
Trip: A one-way trip booked by the rider. A round trip is counted as two (2) trips.

Late Cancellation: A trip for which a rider cancels two (2) hours or less before the scheduled pick-up time.

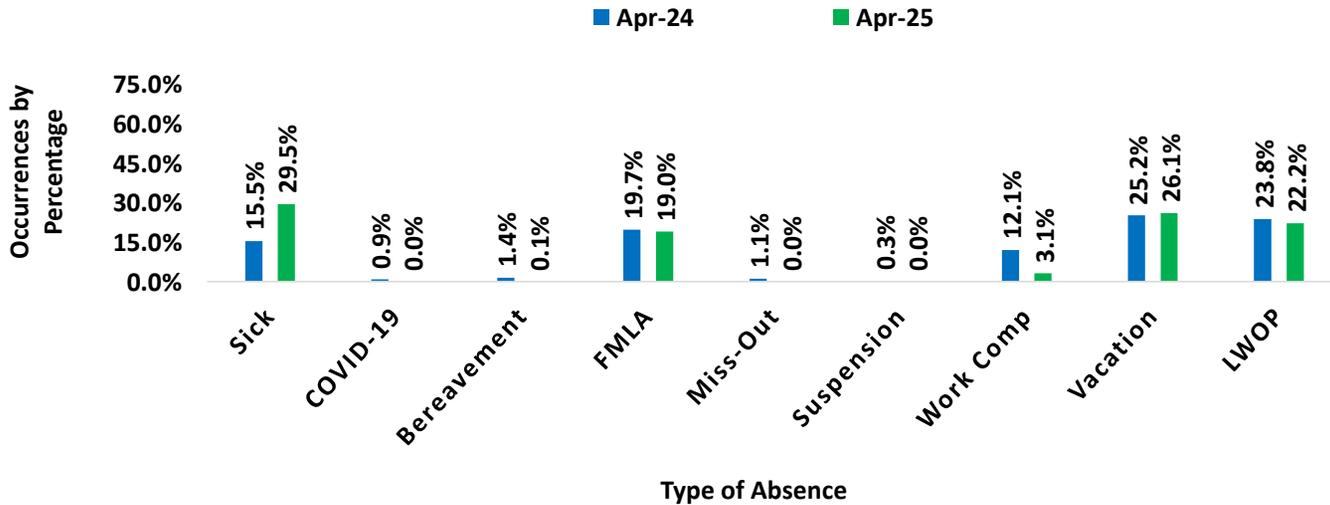
Goal for Late Cancellations: 3% or below.

Total Trips: Total one-way trips completed.

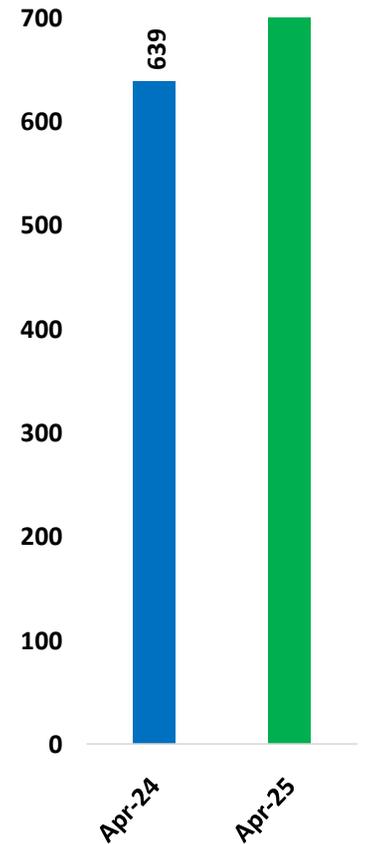
### Fixed Route Operator Absence by Type



### Fixed Route Operator Absence Type by Percentage

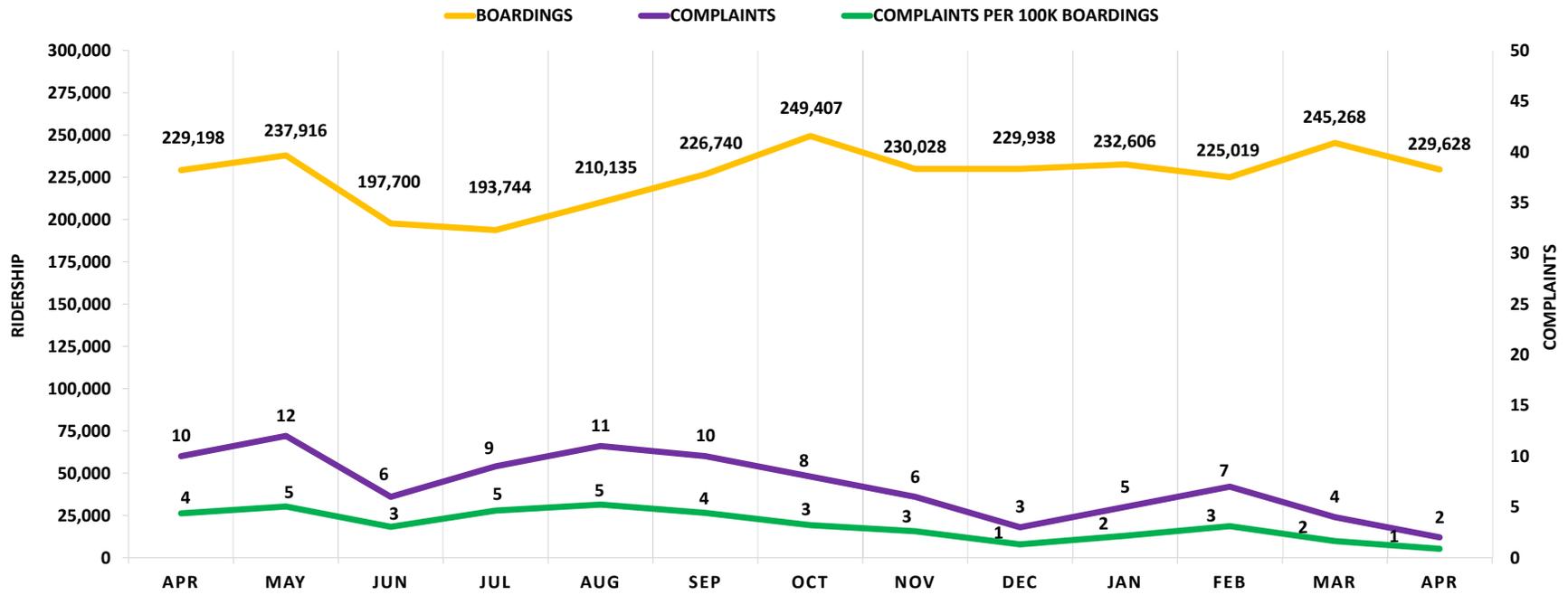


### Fixed Route Total Absence Occurrences

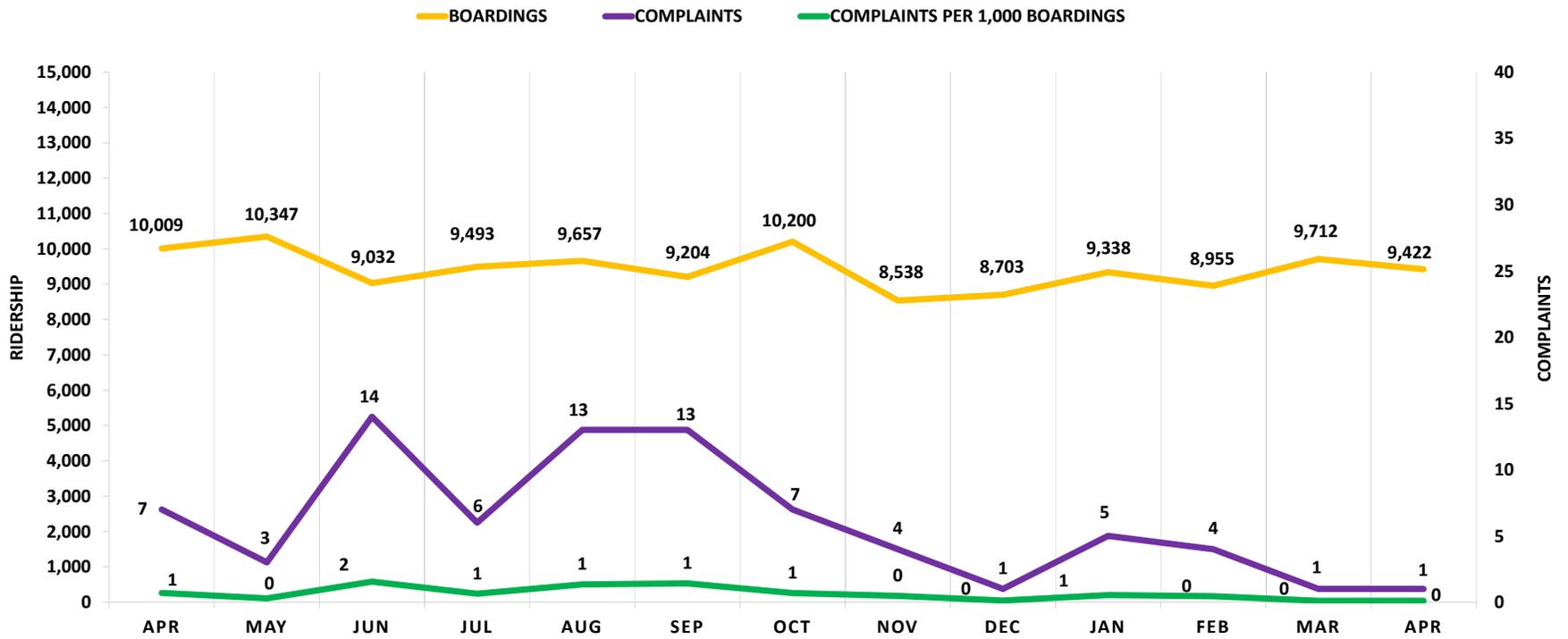


This chart includes unplanned/unscheduled and COVID-19 absences for Fixed Route drivers. For the month of April 2025, 24% of SunLine's fixed route operator workforce was absent when compared to April 2024 at 21%. For the month of April 2025, workforce was at a total of 127 operators when compared to April 2024 at 147 operators.

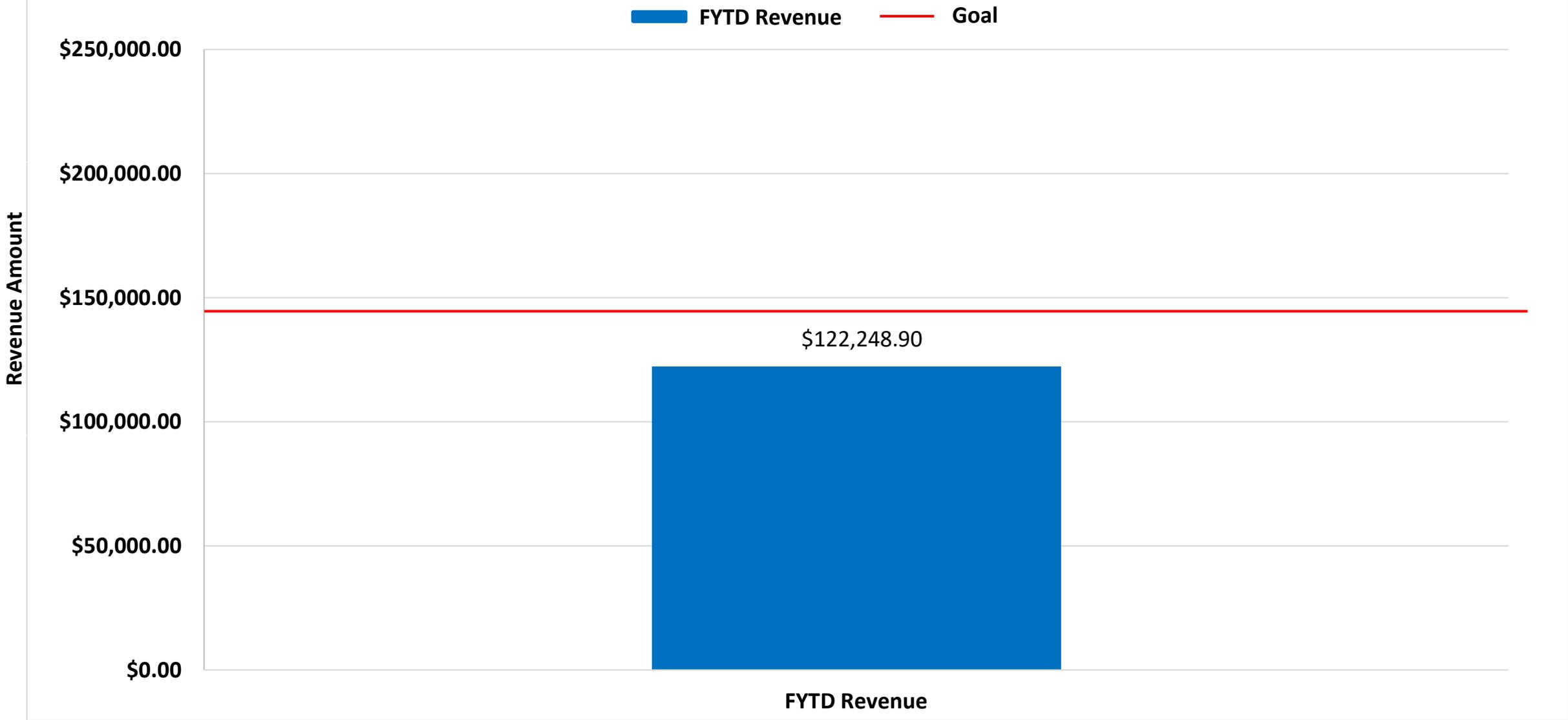
### Fixed Route Customer Complaints April 2024 to April 2025



## Paratransit Customer Complaints April 2024 to April 2025



# Advertising Revenue FYTD Revenue vs. Yearly Goal April 2025

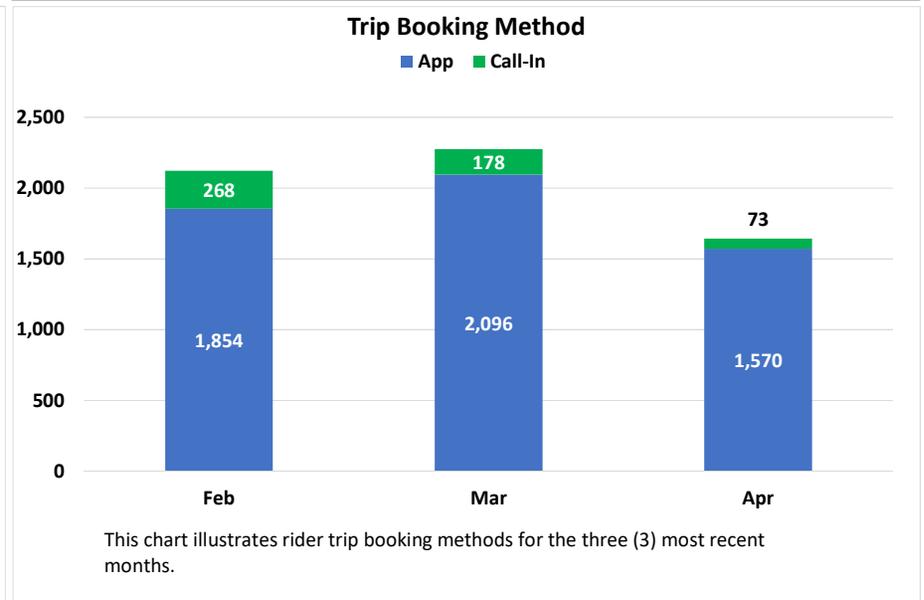
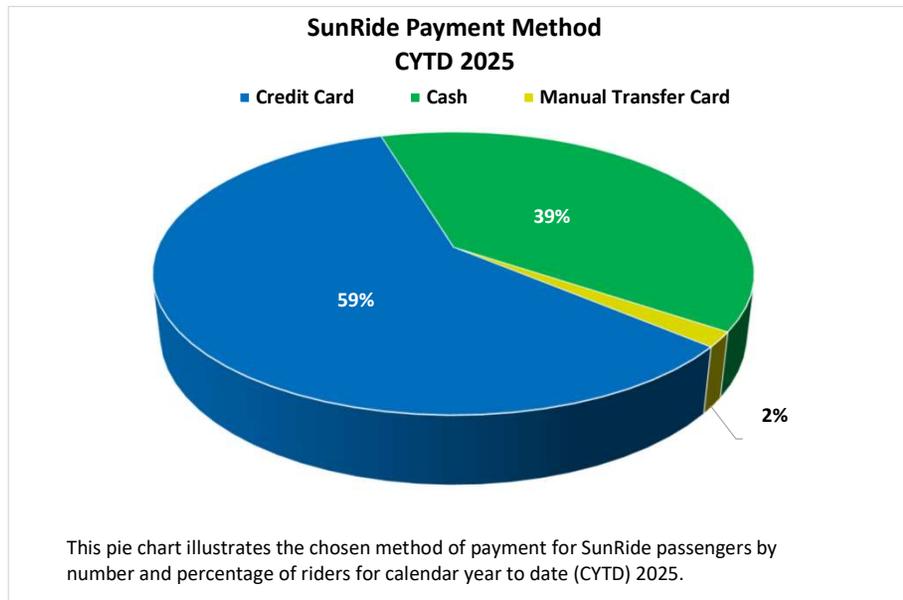
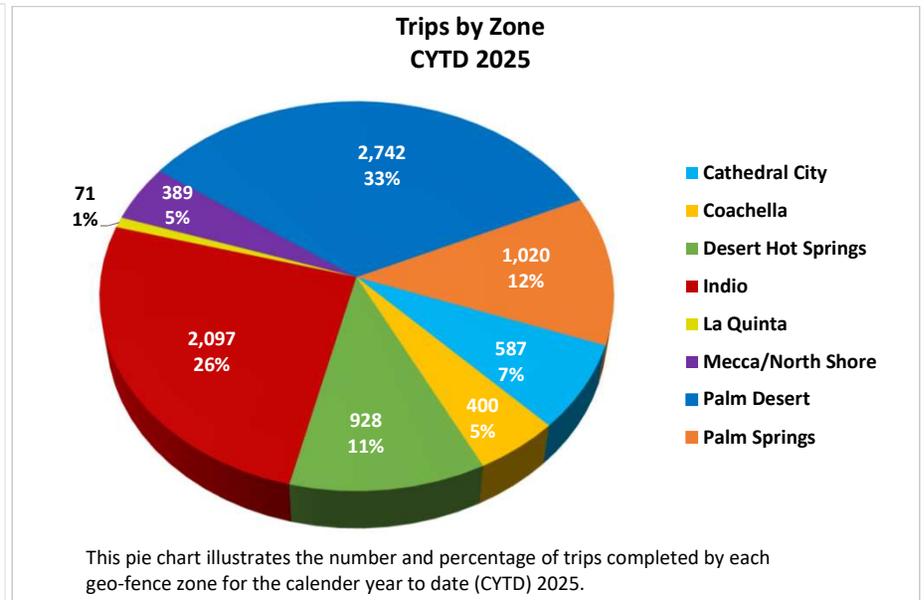
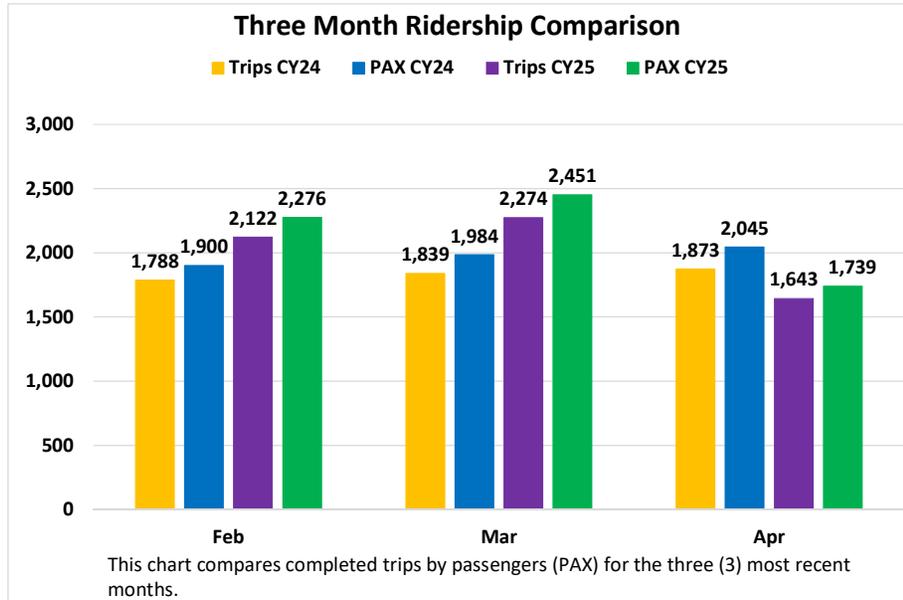


Advertising revenue tracks revenue of invoiced contracts for bus shelter and bus wrap advertising. The graph tracks FYTD revenue versus our yearly goal. The yearly goal for FY25 is \$150,000 (*advertising revenues follow Finance Department reporting from the previous two (2) months*).

## SunRide System-Wide Metrics CYTD 2025

**Total Completed Trips: 8,234**

**Total Number of Passengers: 8,817**

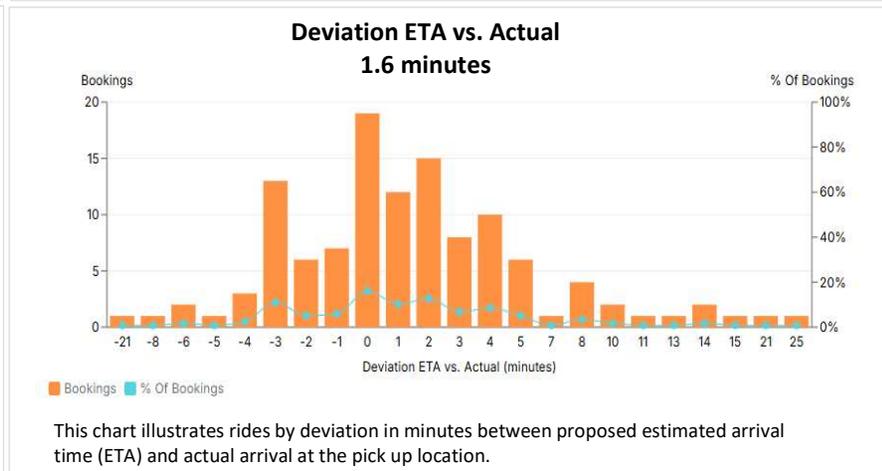
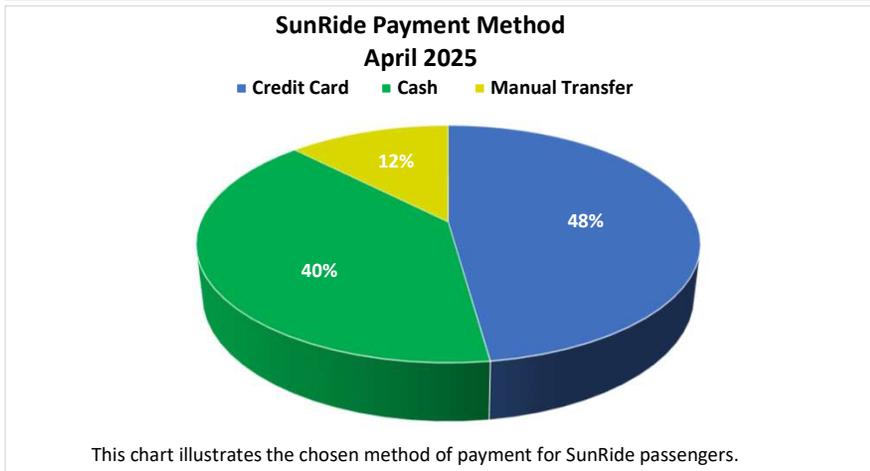
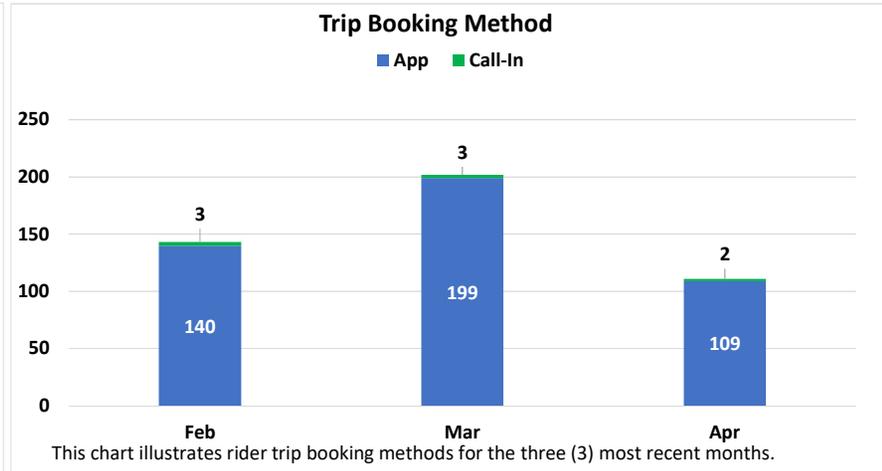
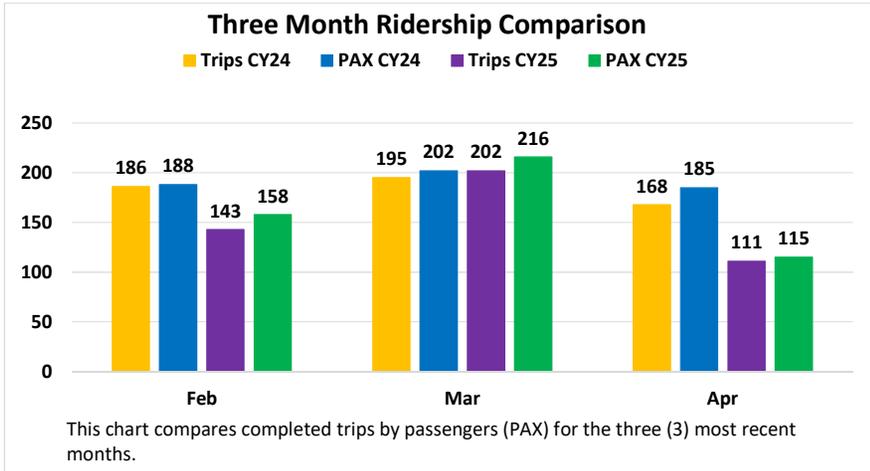


**Percentage of Trips System-wide as Ridesharing: 20%.**  
 [Based on No. of Shared Rides for the month (322) divided by Total Trips Completed (1,643)].

## Cathedral City Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 587**

**Total Number of Passengers: 628**



**Percentage of Trips as Ridesharing: Five (5) percent.**  
 [Based on No. of Shared Rides for the month (6) divided by Total Trips Completed (111).]

**Customer Satisfaction Rating**  
 Avg. rider trip rating 5.0  
 Goal: 4.5

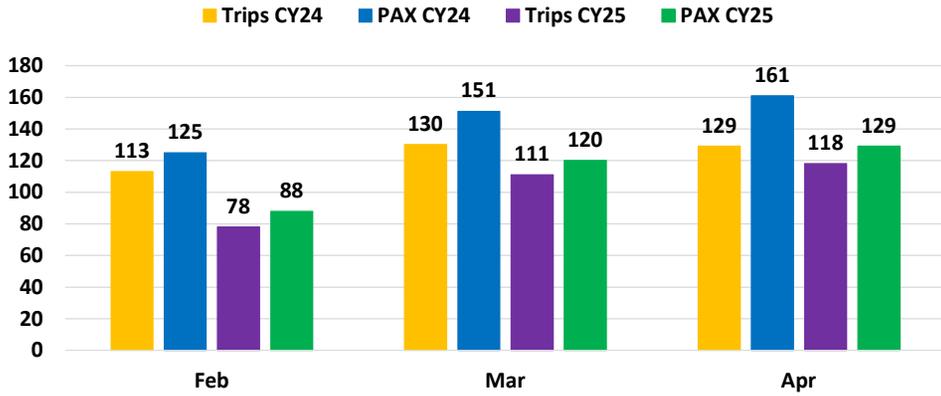


## Coachella Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 400**

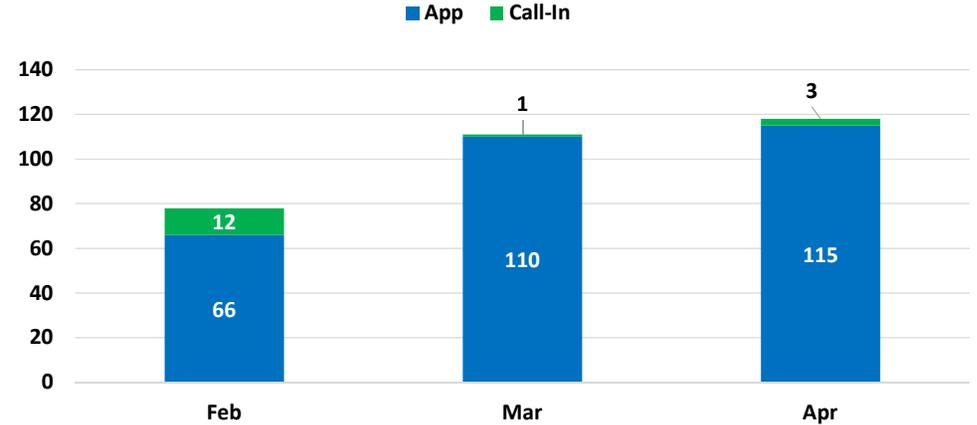
**Total Number of Passengers: 435**

### Three Month Ridership Comparison



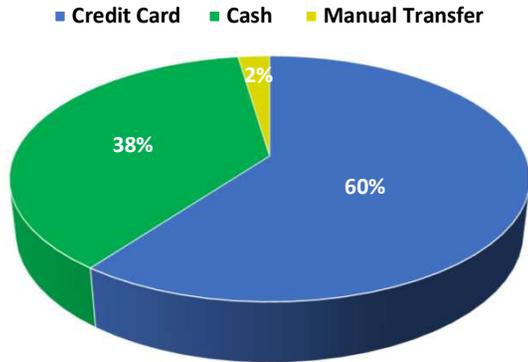
This chart compares completed trips by passengers (PAX) for the three (3) most recent months.

### Trip Booking Method



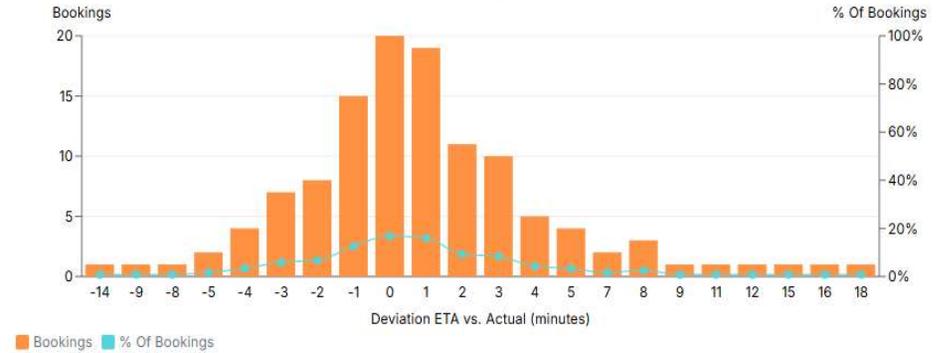
This chart illustrates rider trip booking methods for the three (3) most recent months.

### SunRide Payment Method April 2025



This chart illustrates the chosen method of payment for SunRide passengers.

### Deviation ETA vs. Actual 1 minute



This chart illustrates rides by deviation in minutes between proposed estimated arrival time (ETA) and actual arrival at the pick up location.



**Percentage of Trips as Ridesharing: Three (3) percent.**  
[Based on No. of Shared Rides for the month (4) divided by Total Trips Completed (118).]

**Customer Satisfaction Rating**  
Avg. rider trip rating: 5.0  
Goal: 4.5

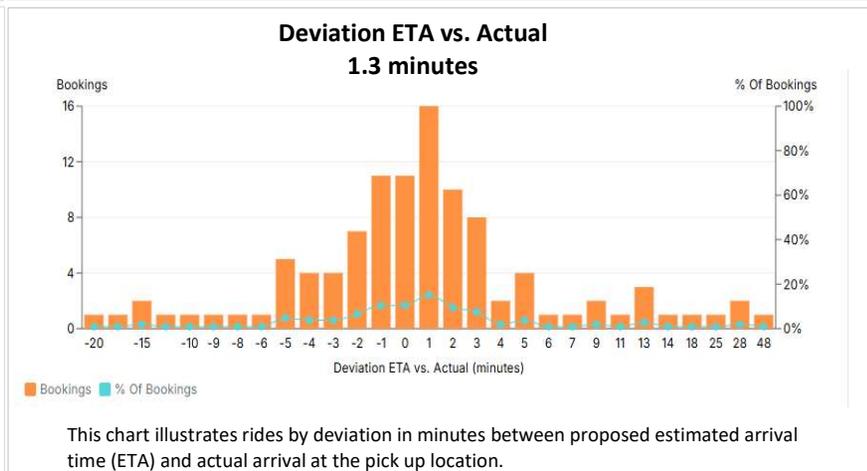
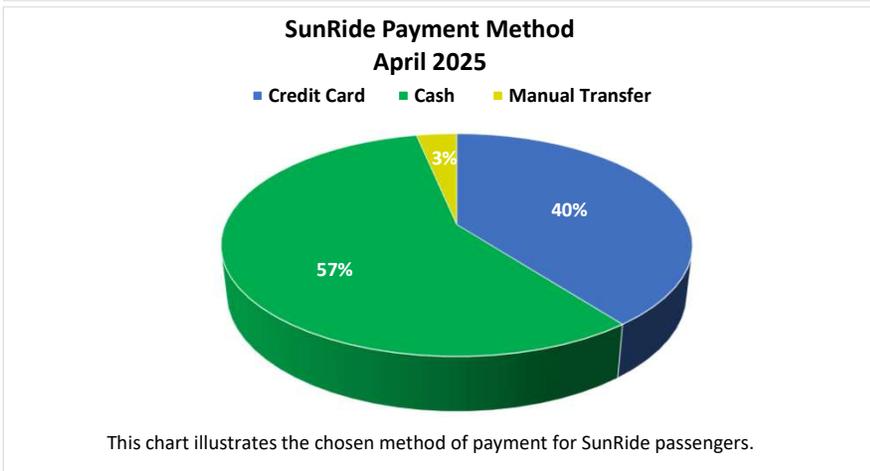
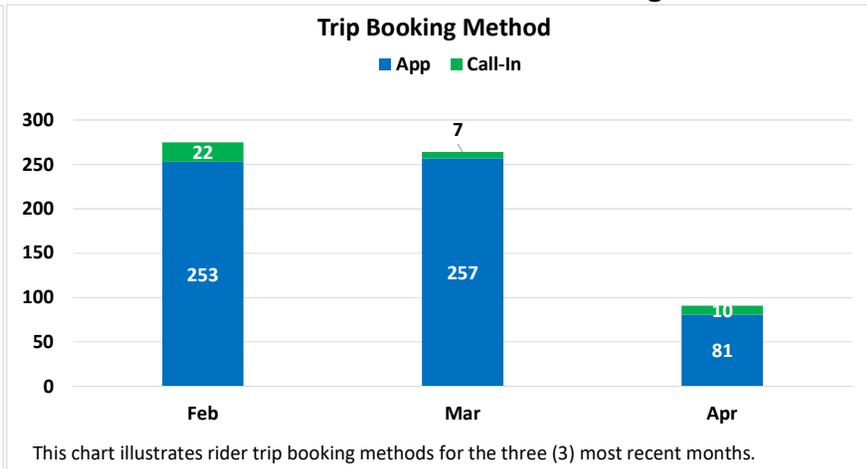
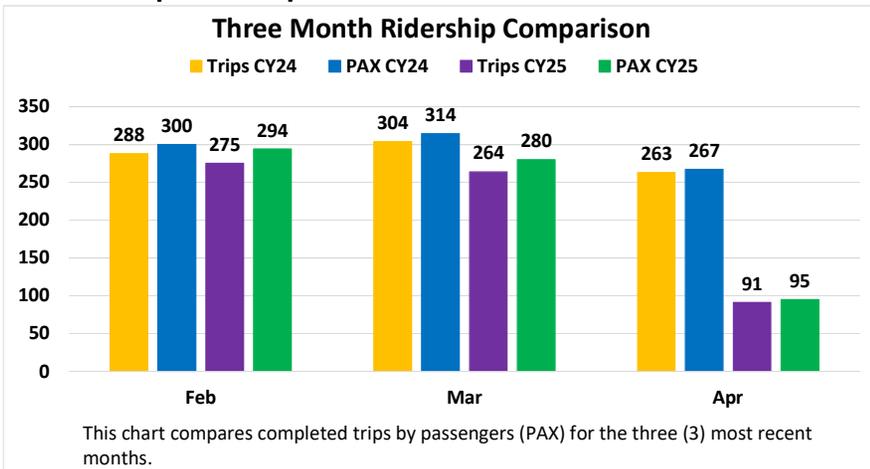


**EXCEEDS GOAL!**

## Desert Hot Springs/Desert Edge Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 928**

**Total Number of Passengers: 970**



**Percentage of Trips as Ridesharing: 18%**  
 [Based on No. of Shared Rides for the month (47) divided by Total Trips Completed (264).]

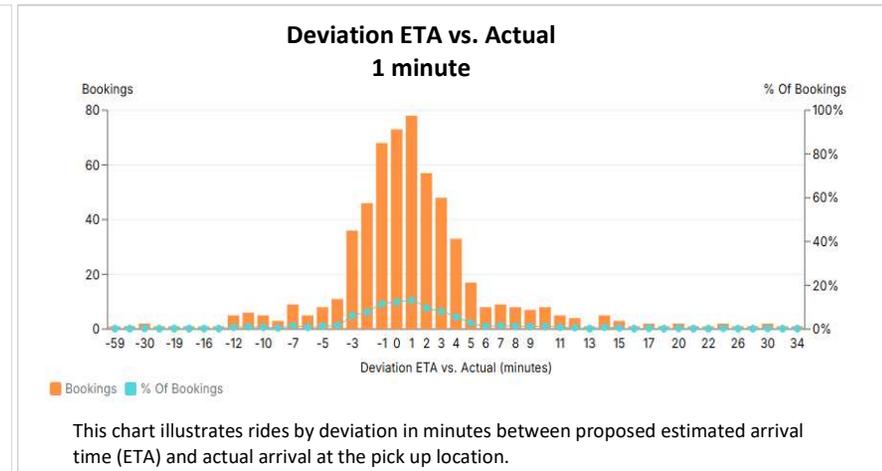
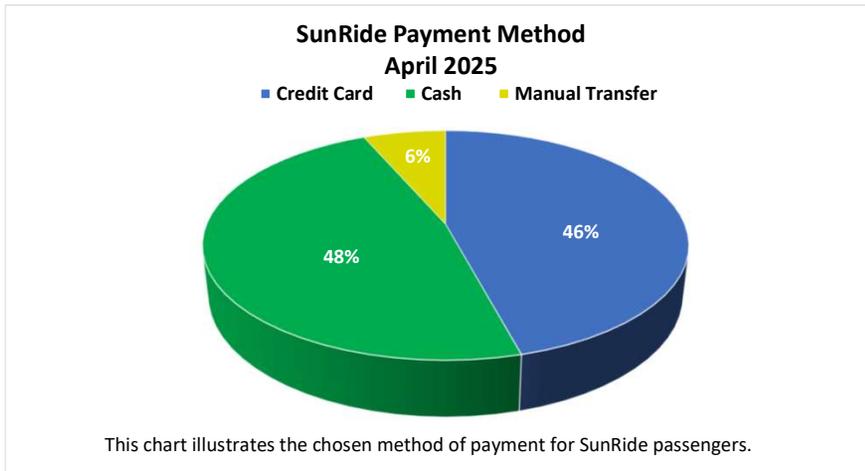
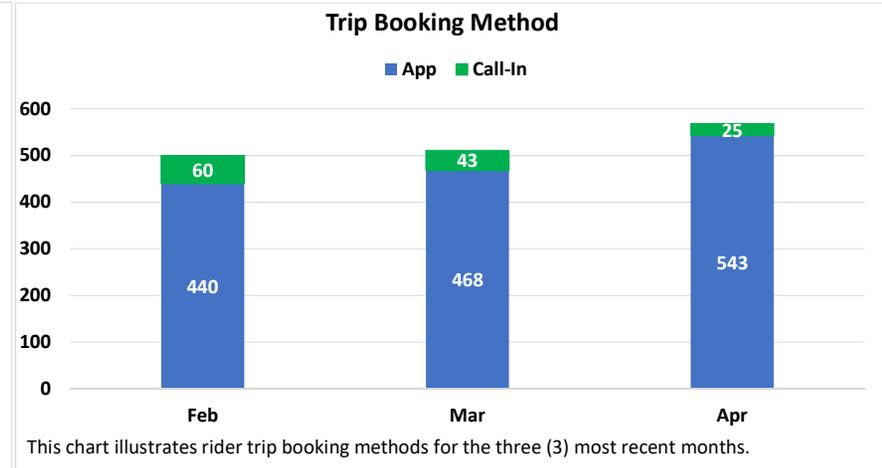
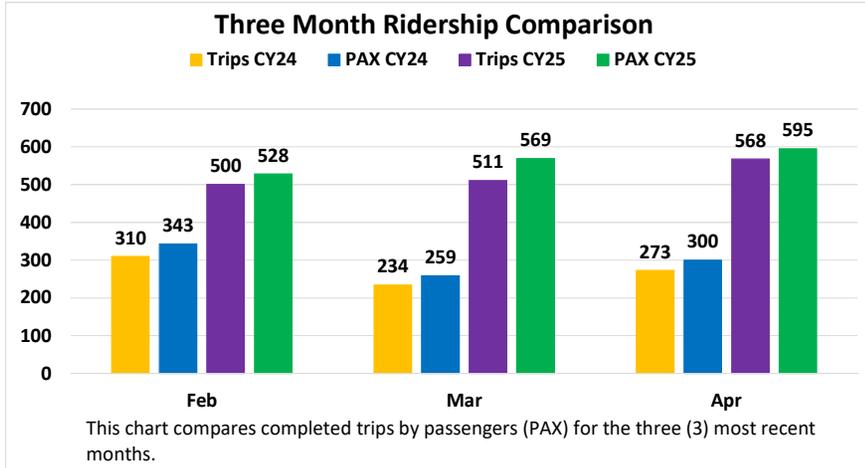
**Customer Satisfaction Rating**  
 Avg. rider trip rating 4.6  
 Goal: 4.5



## Indio Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 2,097**

**Total Number of Passengers: 2,237**



**Percentage of Trips as Ridesharing: 27%.**  
 [Based on No. of Shared Rides for the month (156) divided by Total Trips Completed (568).]

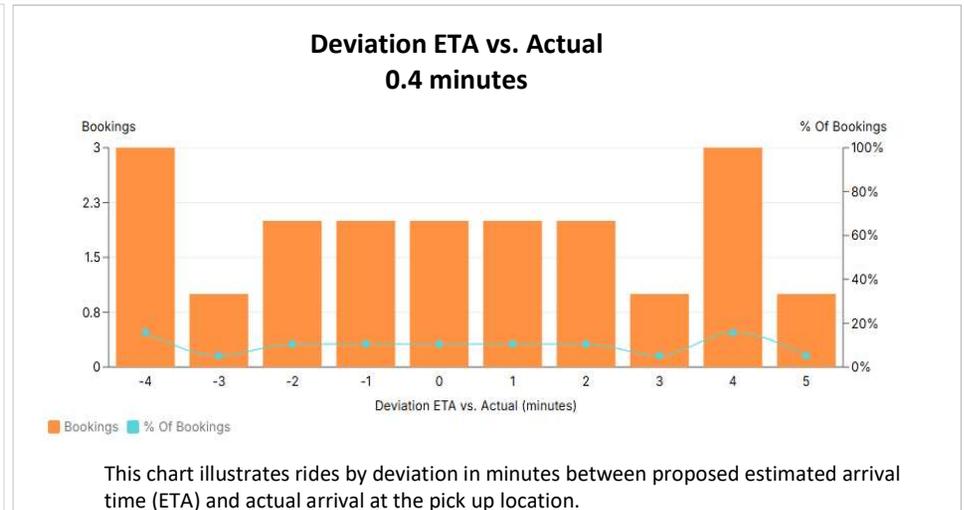
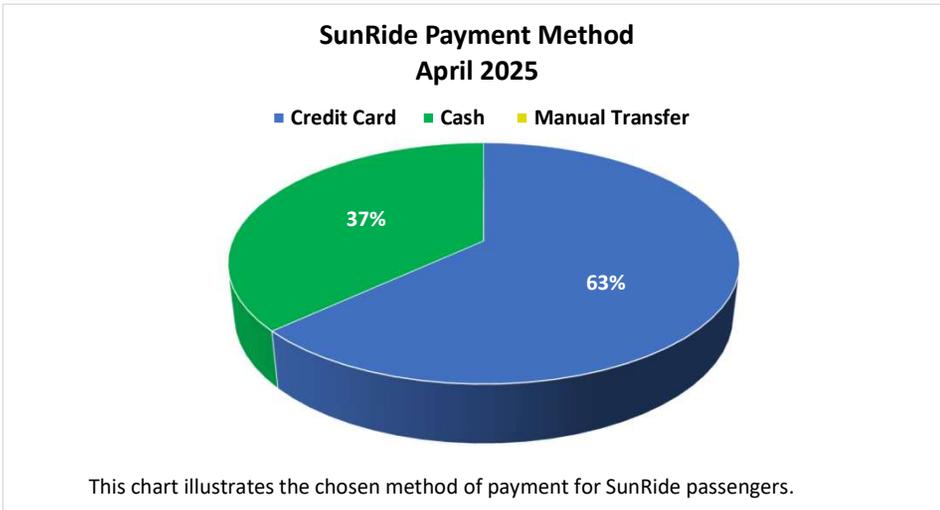
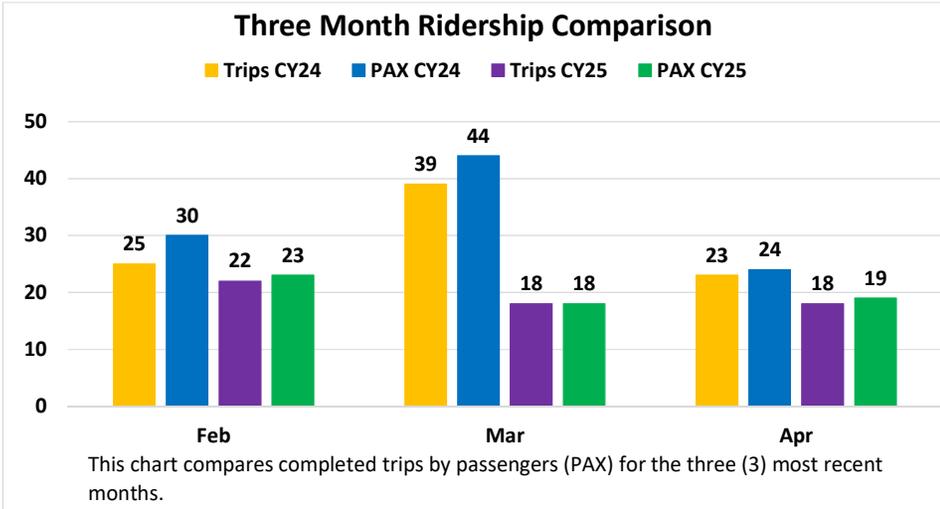
**Customer Satisfaction Rating**  
 Avg. rider trip rating 4.9  
 Goal: 4.5

★ ★ ★ ★ ★  
**EXCEEDS GOAL**

## La Quinta Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 71**

**Total Number of Passengers: 73**



**Percentage of Trips as Ridesharing: Zero (0) percent.**  
[Based on No. of Shared Rides for the month (0) divided by Total Trips Completed (18).]

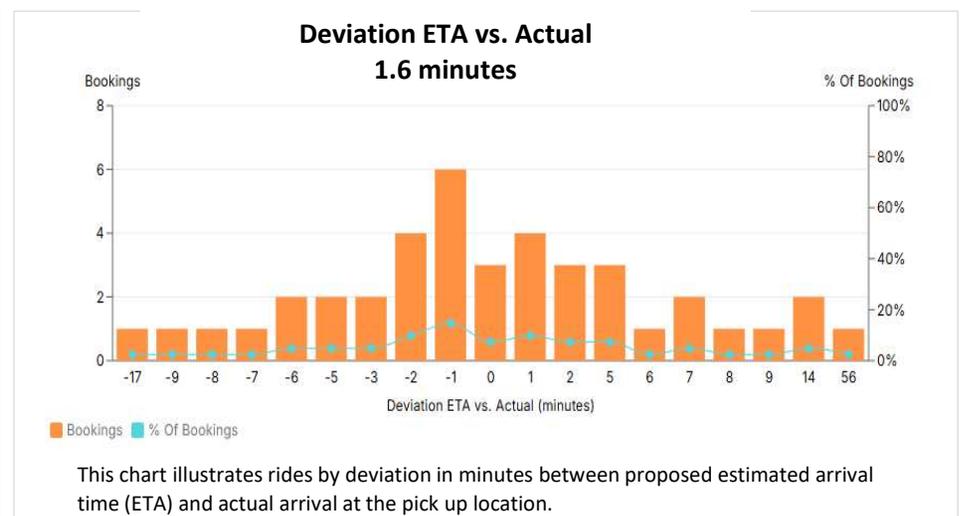
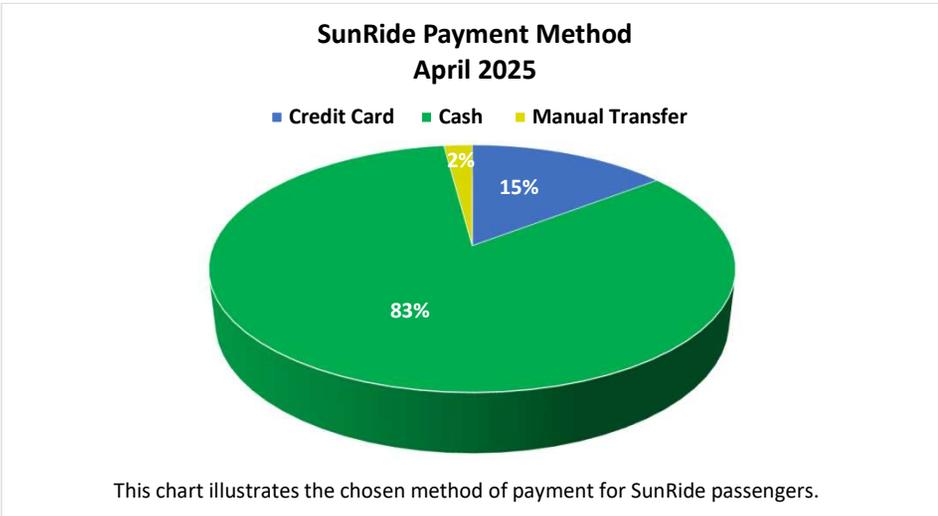
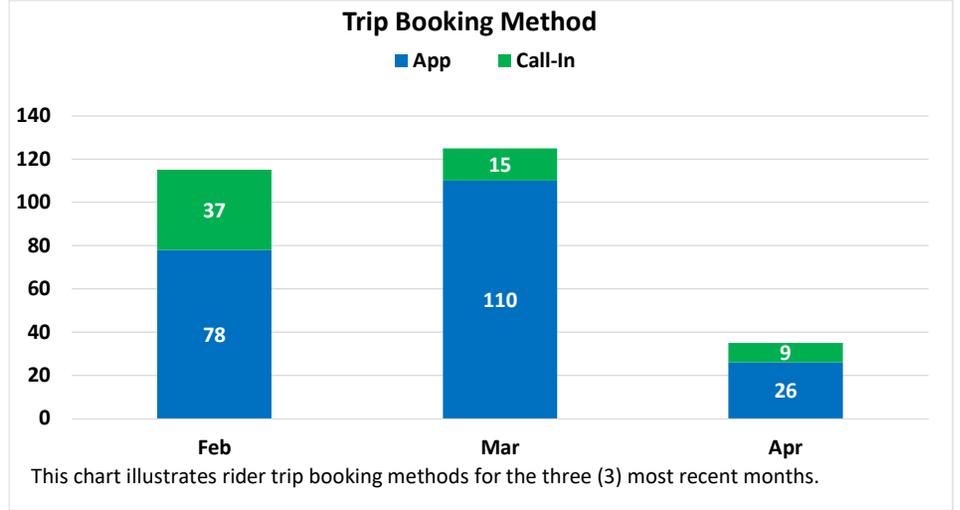
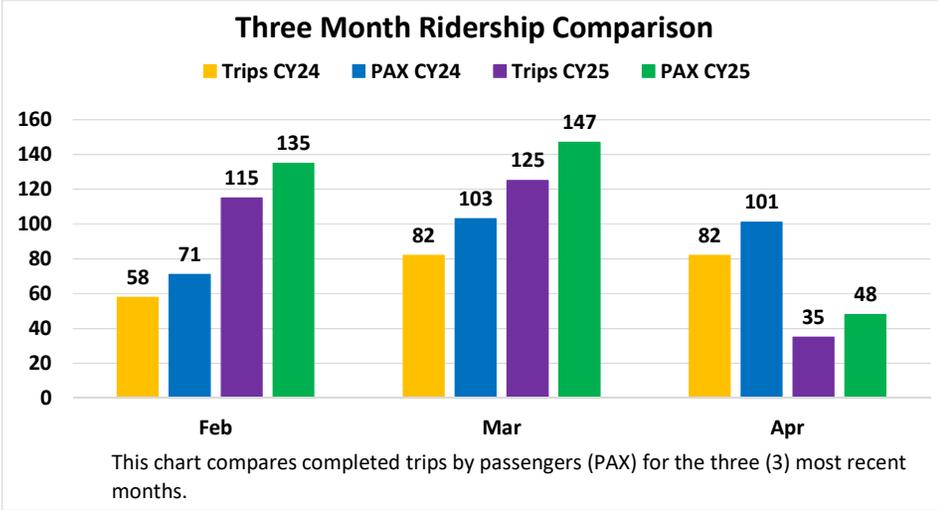
**Customer Satisfaction Rating**  
Avg. rider trip rating: 5.0  
Goal: 4.5



## Mecca/North Shore Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 389**

**Total Number of Passengers: 475**



**Percentage of Trips as Ridesharing: Zero (0) percent.**  
[Based on No. of Shared Rides for the month (0) divided by Total Trips Completed (35).]

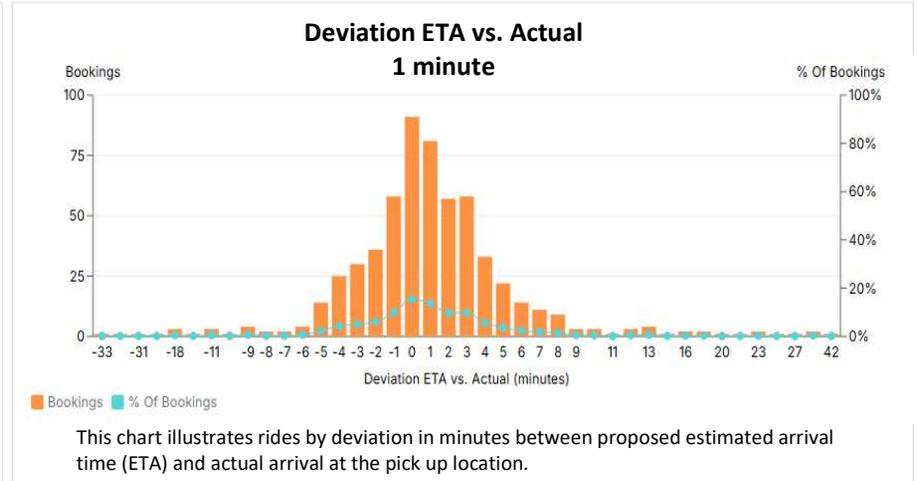
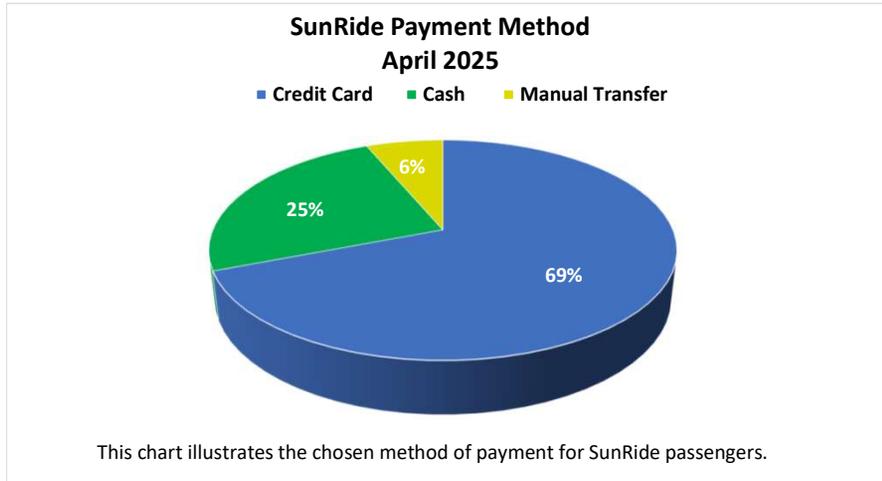
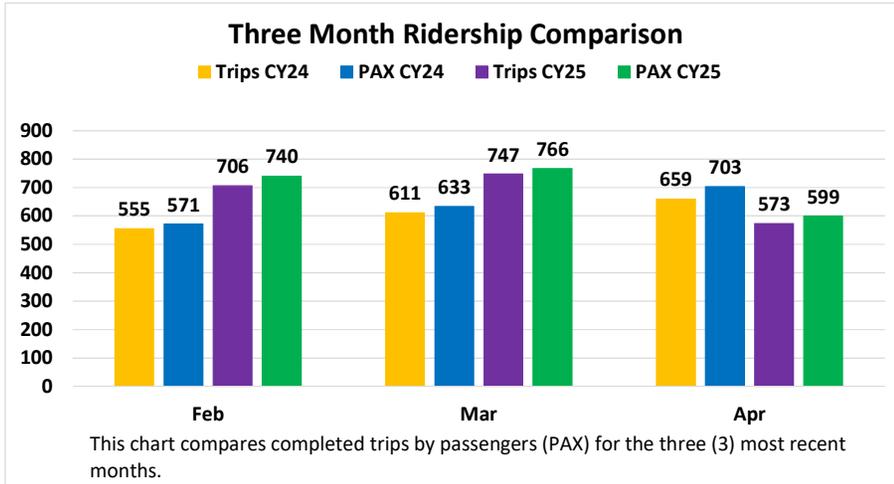
**Customer Satisfaction Rating**  
Avg. rider trip rating: 5.0  
Goal: 4.5



## Palm Desert Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 2,742**

**Total Number of Passengers: 2,876**



**Percentage of Trips as Ridesharing: 24%.**  
[Based on No. of Shared Rides for the month (137) divided by Total Trips Completed (572).]

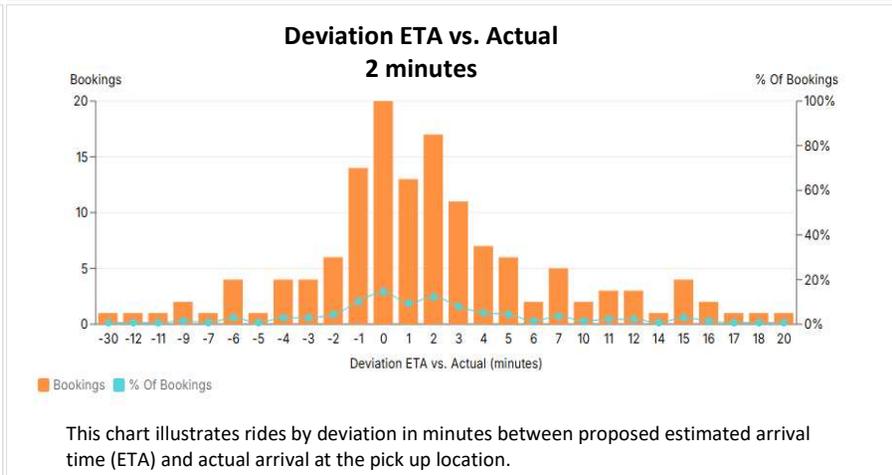
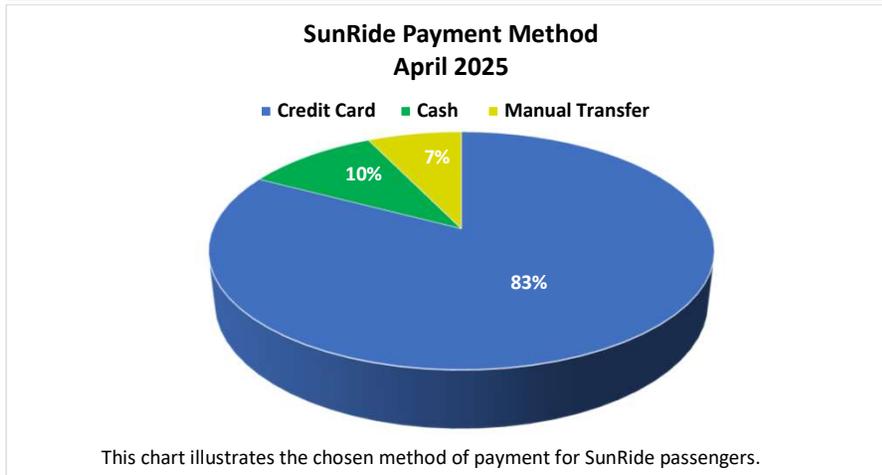
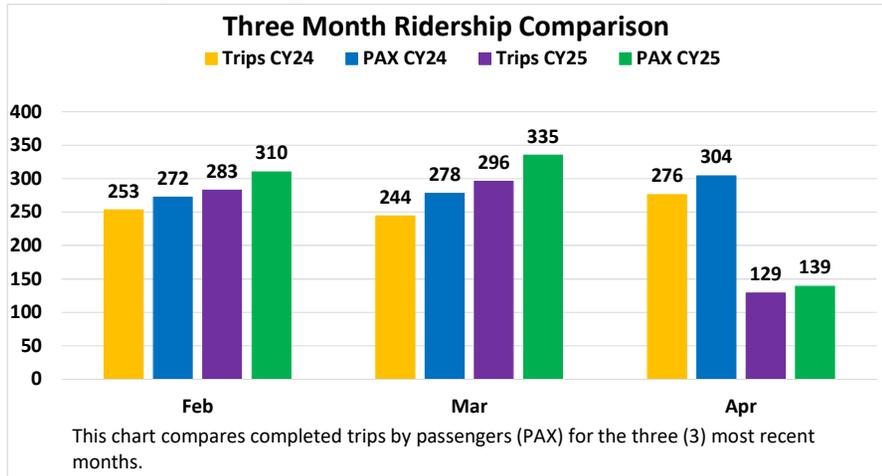
**Customer Satisfaction Rating**  
Avg. rider trip rating: 4.9  
Goal: 4.5



## Palm Springs Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 1,020**

**Total Number of Passengers: 1,123**

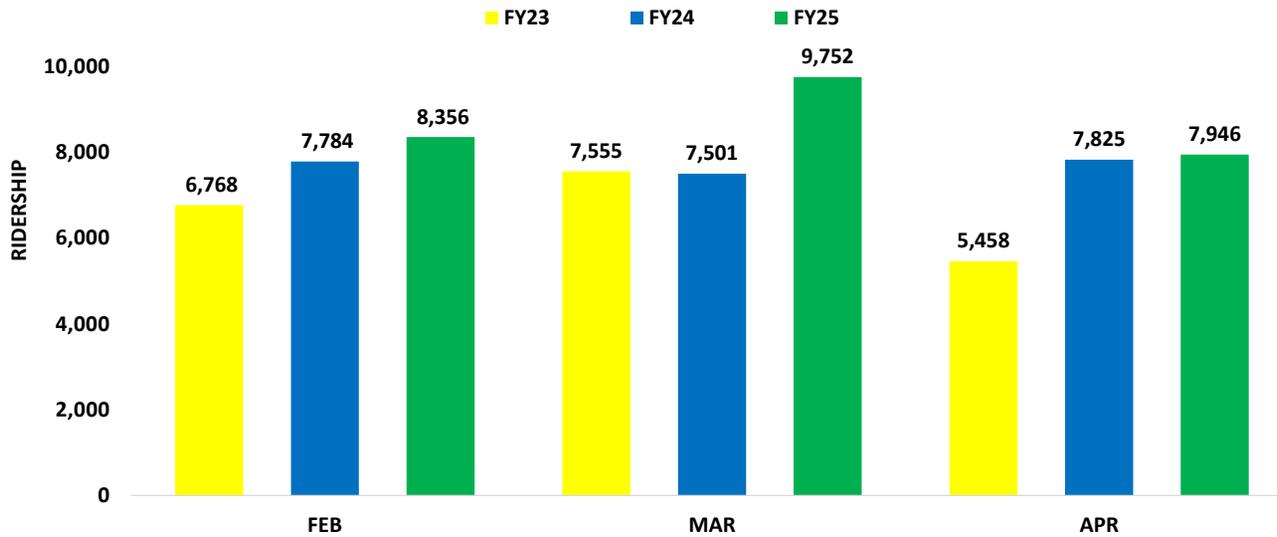


**Percentage of Trips as Ridesharing: Nine (9) percent.**  
 [Based on No. of Shared Rides for the month (12) divided by Total Trips Completed (129).]

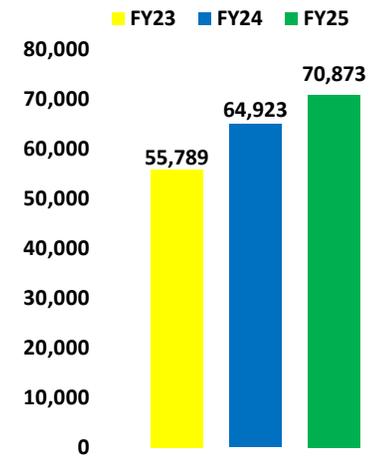
**Customer Satisfaction Rating**  
 Avg. rider trip rating 4.8  
 Goal: 4.5



### Haul Pass COD Ridership - April 2025



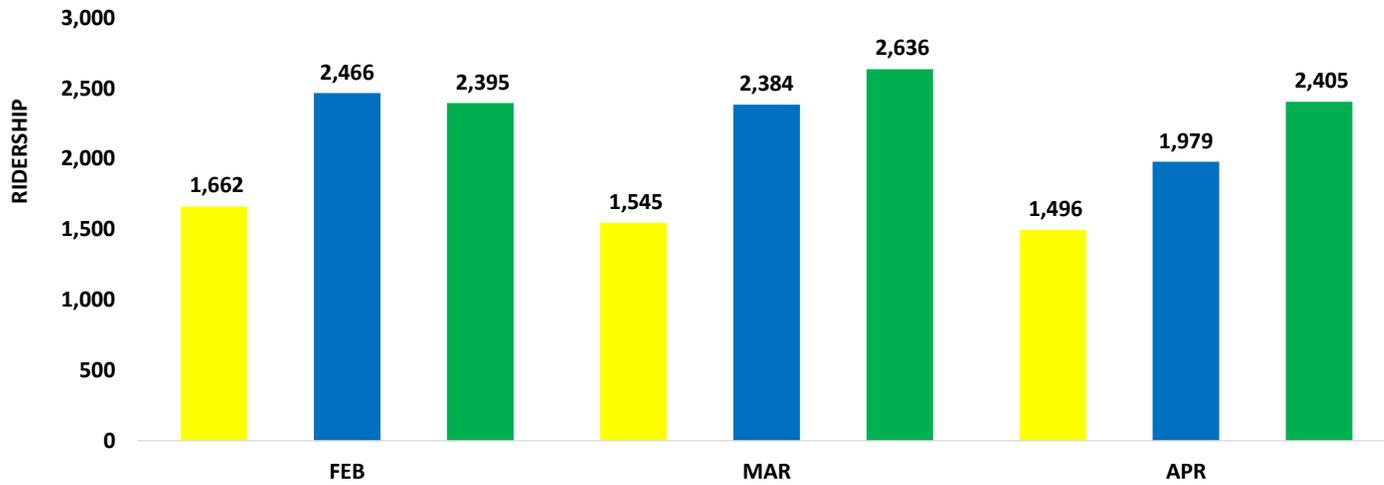
### COD Fixed Route Ridership Year to Date



The Haul Pass program was introduced in August 2018.  
 This chart represents monthly ridership on the Haul Pass COD.  
 ID Card swipe contributed 112 rides. Token Transit contributed 7,673 rides. 31 Day Paper Pass contributed 161 rides.  
 COD moved over to Token Transit & 31 Day University Paper Pass as of June 3, 2024.

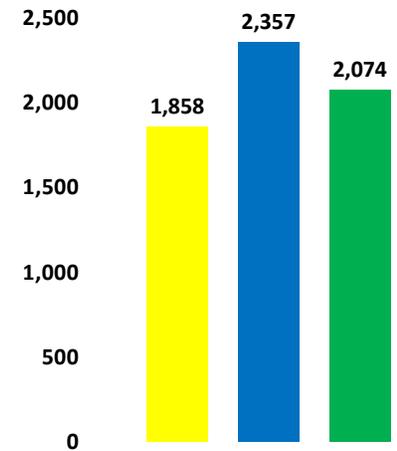
### Haul Pass CSUSB Ridership - April 2025

FY23 Route 10 CL    FY24 Route 10 CL    FY25 Route 10 CL



### CSUSB Fixed Route Ridership Total

FY23    FY24    FY25



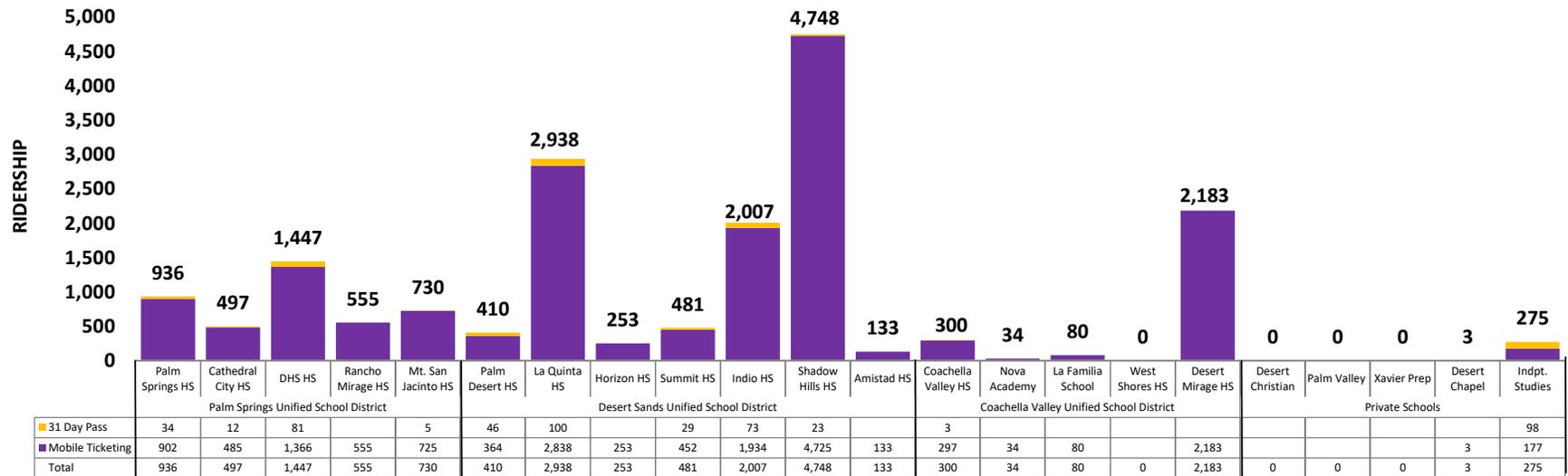
The Haul Pass CSUSB program was introduced in September 2019.

This chart represents monthly ridership on the Haul Pass CSUSB.

For the month of April 2025, CSUSB contributed 2,405 rides from 236 unique users. From that total, 2,226 rides were used on Route 10 and 179 rides on the fixed route system.

## High School Haul Pass - April 2025

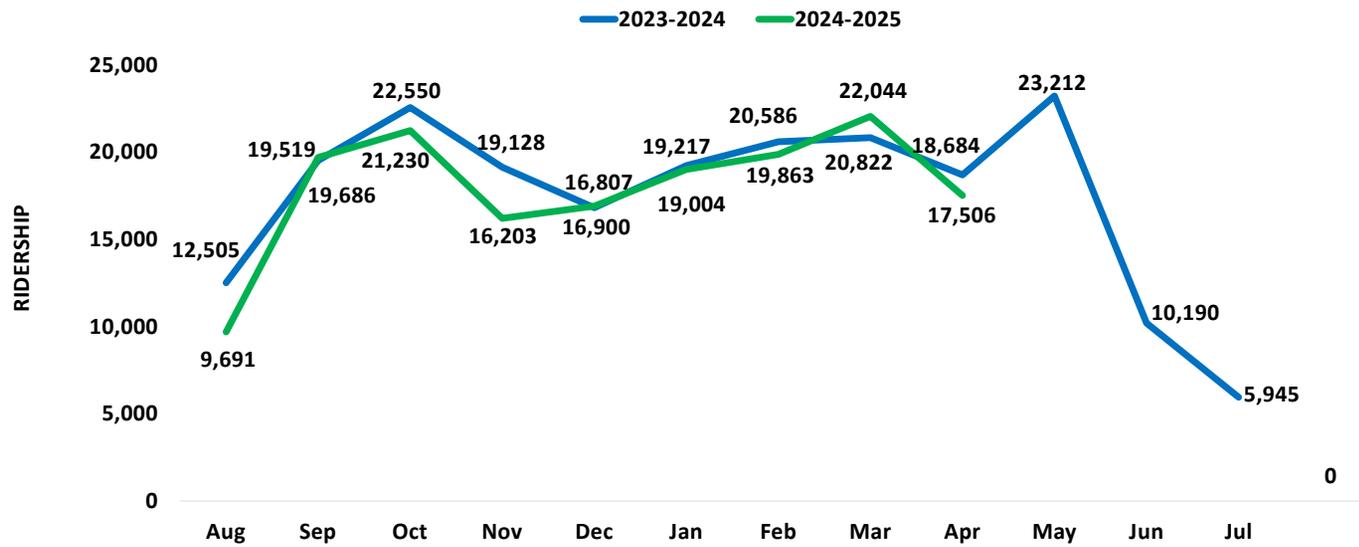
■ Mobile Ticketing   
 ■ 31 Day Pass



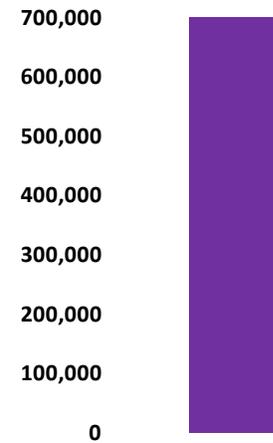
The High School Haul Pass program was introduced in August 2021.

This chart represents a monthly combination of Mobile Ticketing and 31 Day Pass ridership by school for the High School Haul Pass.

### High School Haul Pass - Year to Date



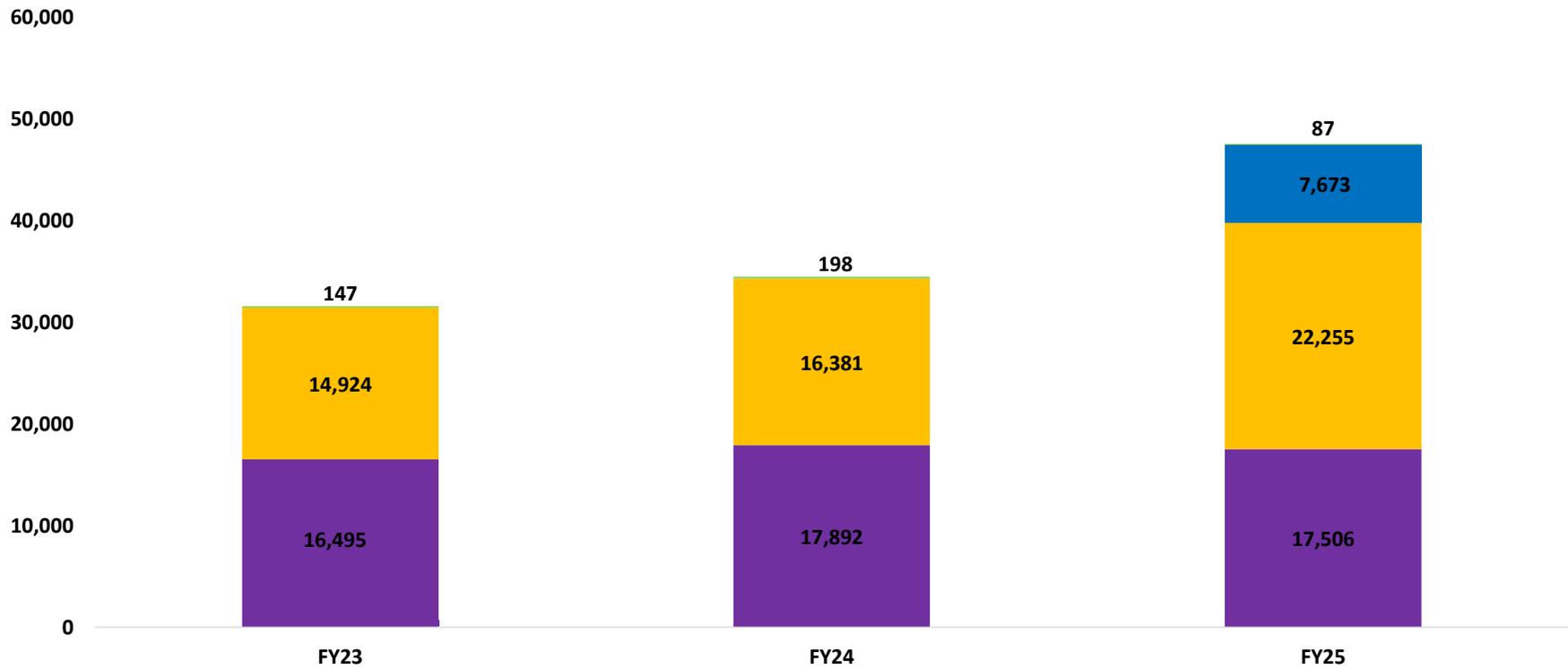
### High School Haul Pass Ridership Total



The High School Haul Pass program was introduced in August 2021.  
 This chart represents monthly ridership comparison for the High School Haul Pass.

## Mobile Ticketing Usage - April 2025

■ High School Haul Pass
 ■ Fixed Route
 ■ COD
 ■ Paratransit



This chart represents all monthly mobile ticketing usage by category based on the Token Transit app data. The total for January 2025 includes the following passes used through Token Transit: High School Haul Pass, COD Haul Pass, Fixed Route and Paratransit. Mobile Ticketing was introduced for COD Haul Pass in June 2024.

**SunLine Transit Agency**

**CONSENT CALENDAR**

DATE: June 25, 2025

**APPROVE**

TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of Board Member Attendance for May 2025

Summary:

The attached report summarizes the Board of Directors' attendance for fiscal year to date May 2025.

Recommendation:

Approve.

FY 24/25	Board Member Matrix Attendance													Total Meetings	Total Attended
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun			
Desert Hot Springs	X		X	X		X		X	X	X	X		10	8	
Palm Desert	X		X	X		X	X	X	X	X	X		10	9	
Palm Springs	X		X	X		X	X	X	X	X	X		10	9	
Cathedral City	X		X	X			X	X	X	X	X		10	8	
Rancho Mirage	X		X	X		X	X	X	X	X	X		10	9	
Indian Wells	X			X		X		X	X	X	X		10	7	
La Quinta	X		X	X		X	X	X	X	X	X		10	9	
Indio	X		X	X		X	X	X	X		X		10	8	
Coachella	X		X	X			X		X	X	X		10	7	
County of Riverside	X		X	X		X	X	X	X	X	X		10	9	

**X - ATTENDED (Primary/Alternate)**

**DARK –**

**SunLine Transit Agency**

**CONSENT CALENDAR**

DATE: June 25, 2025

**APPROVE**

TO: Board of Directors

RE: Approval of Joint Board Meeting Minutes for May 28, 2025

Summary:

The attached report summarizes the Joint Board Meeting Minutes from the Board of Directors' meeting held on May 28, 2025.

Recommendation:

Approve.

**MINUTES**

**Joint SunLine Transit Agency/SunLine Services Group  
Board of Directors Meeting  
May 28, 2025**

A joint regular meeting of the SunLine Transit Agency and SunLine Services Group Board of Directors was held at 12:00 p.m. on Wednesday, May 28, 2025 in the Board Room at SunLine Transit Agency, 32-505 Harry Oliver Trail, Thousand Palms, CA 92276.

**1. CALL TO ORDER**

The meeting was called to order at 12:02 p.m. by Chairperson Ross.

**2. FLAG SALUTE**

Board Member Harnik led the pledge of allegiance.

**3. ROLL CALL**

Members Present:

- Nancy Ross, Chair, SunLine Agency Board Member, City of Cathedral City
- Lynn Mallotto, Vice-Chair, SunLine Agency Board Member, City of Rancho Mirage
- Daniel Pitts, SunLine Agency Board Member, City of Desert Hot Springs
- Glenn Miller, SunLine Agency Board Member, City of Indio
- Grace Garner, SunLine Agency Board Member, City of Palm Springs
- Jan Harnik, SunLine Agency Board Member, City of Palm Desert
- John Peña, SunLine Agency Board Member, City of La Quinta\*
- Pat Cooper, SunLine Agency Board Member Alternate, County of Riverside
- Toper Taylor, SunLine Agency Board Member Alternate, City of Indian Wells\*
- Yadira Perez, SunLine Agency Board Member Alternate, City of Coachella

*\*Joined the meeting after it was called to order.*

**4. FINALIZATION OF AGENDA**

Due to the cancellation of all committee meetings, Agenda Items 12, 13, 15, and 18 were removed. Additionally, Item 20 was renumbered and moved to become Item 12 on the agenda.

**5. PUBLIC COMMENTS**

None.

**SUNLINE TRANSIT AGENCY/  
SUNLINE SERVICES GROUP  
BOARD OF DIRECTORS MEETING - MINUTES  
MAY 28, 2025**

**6. PUBLIC HEARING**

*\*Board Member Peña and Board Member Alternate Taylor  
joined the meeting at 12:04 p.m.*

**a) Assembly Bill 2561 – Annual Vacancy**

Chairperson Ross opened the Public Hearing for the purpose of considering the status of agency vacancies and recruitment and retention efforts. An oral report was presented by Magali Jimenez, HR Specialist – Recruitment. Board Member Peña moved to motion to close the Public Hearing. The motion was seconded by Board Member Miller. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

**7. CLOSED SESSION**

**a) CONFERENCE WITH LABOR NEGOTIATORS**

Pursuant to Government Code section 54957.6

Agency designated representatives: Irma Rodriguez Moisa and Tamara Miles  
Employee Organization: Amalgamated Transit Union, Local 1277

**b) PUBLIC EMPLOYEE PERFORMANCE EVALUATION**

Pursuant to Government Code section 54957(b)

Position: Chief Executive Officer/General Manager

The Board of Directors convened to Closed Session at 12:15 p.m.

**8. RECONVENE TO OPEN SESSION AND REPORT OUT FROM CLOSED SESSION**

The open session resumed at 12:46 p.m. General Counsel reported that there was no reportable action for items 7a and 7b.

**9. PRESENTATIONS**

None.

**10. BOARD MEMBER COMMENTS**

Board Member comments were made by:

- Board Member Alternate Cooper, County of Riverside
- Board Member Garner, City of Palm Springs
- Board Member Alternate Taylor, City of Indian Wells
- Chairperson Ross, City of Cathedral City
- Mona Babauta, CEO/General Manager

**SUNLINE TRANSIT AGENCY/  
SUNLINE SERVICES GROUP  
BOARD OF DIRECTORS MEETING - MINUTES  
MAY 28, 2025**

**11. CONSENT CALENDAR**

Board Member Peña moved to approve the consent calendar. The motion was seconded by Board Member Miller. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

**12. LEGISLATIVE UPDATE FOR MAY 2025**

An oral report was provided by Edith Hernandez, Director of Board and Legislative Affairs, along with Matt Robinson and Brendan Repicky, lobbyists from Shaw Yoder Antwih Schmelzer & Lange (SYASL), on this information item. No action was taken.

Comments were made by:

- Board Member Alternate Taylor, City of Indian Wells
- Chairperson Ross, City of Cathedral City
- Mona Babauta, CEO/General Manager

**13. AWARD OF CONTRACT FOR COMPREHENSIVE OPERATIONAL ANALYSIS SERVICES**

Item 13 was removed from this month's agenda and will be brought forward at the July Board meeting.

**14. REVISED ADVERTISING POLICY**

Item 14 was removed from this month's agenda and will be brought forward at the July Board meeting.

**15. APPROVAL OF THE COLLECTIVE BARGAINING AGREEMENT WITH AMALGAMATED TRANSIT UNION, LOCAL 1277**

An oral report was presented by Tamara Miles, Chief of Human Relations, regarding this action item. Vice-Chair Mallotto moved to approve the Collective Bargaining Agreement with Amalgamated Transit Union, Local 1277. The motion was seconded by Board Member Miller. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

**16. OPTIONS – VISION STATEMENT**

Item 16 was removed from this month's agenda and will be brought forward at the July Board meeting.

**SUNLINE TRANSIT AGENCY/  
SUNLINE SERVICES GROUP  
BOARD OF DIRECTORS MEETING - MINUTES  
MAY 28, 2025**

**17. REVIEW AND DISCUSSION OF SUNLINE FUNDING AND THE DRAFT FY26 OPERATING AND CAPITAL BUDGET**

An oral report was presented by Luis Garcia, Chief Financial Officer, regarding this Discussion item. No action was taken.

Comments were made by:

- Board Member Miller, City of Indio
- Board Member Alternate Taylor, City of Indian Wells

**18. SUNLINE REGULATORY ADMINISTRATION DRAFT FY26 BUDGET**

An oral report was presented by Luis Garcia, Chief Financial Officer, regarding this Discussion item. No action was taken.

Four (4) public comments were made by:

- Leo Reyes
- Jose
- Gadi Srulovitz
- Debbie DeRoma

Comments were made by:

- Board Member Peña, City of La Quinta
- Board Member Miller, City of Indio
- Vice-Chair Mallotto, City of Rancho Mirage
- Mona Babauta, CEO/General Manager

**19. 2025 MUSIC FESTIVAL SEASON REPORT**

Item 19 was removed from this month’s agenda and will be brought forward at the July Board meeting.

**20. UPCOMING ELECTION OF OFFICERS**

An oral report was presented by Vanessa Ordorica, Clerk of the Board, regarding this Information item. No action was taken.

**21. CEO/GENERAL MANAGER’S REPORT**

CEO/General Manager, Mona Babauta, provided a brief oral update.

**SUNLINE TRANSIT AGENCY/  
SUNLINE SERVICES GROUP  
BOARD OF DIRECTORS MEETING - MINUTES  
MAY 28, 2025**

**22. NEXT MEETING DATE**

June 25, 2025 at 12 p.m.  
Board Room  
32-505 Harry Oliver Trail  
Thousand Palms, CA 92276

**23. ADJOURN**

The SunLine Services Group and SunLine Transit Agency meeting concurrently adjourned at 1:57 p.m.

Respectfully Submitted,  
  
Vanessa Ordorica  
Clerk of the Board

**SunLine Services Group**

**CONSENT CALENDAR**

DATE: June 25, 2025

**APPROVE**

TO: Taxi Committee  
Board of Directors

RE: Acceptance of Checks \$1,000 and Over Report for April 2025

Summary:

This report lists all of the checks processed at the Agency with a value of over \$1,000 for a given month. There were no checks over \$1,000 issued in the month of April 2025.

Recommendation:

Approve.

**SunLine Regulatory Administration  
Checks \$1,000 and Over  
April 2025**

<b>Vendor Filed As Name</b>	<b>Description</b>	<b>Check #</b>	<b>Payment Date</b>	<b>Payment Amount</b>
<b>Total Checks Over \$1,000</b>	\$0.00			
<b>Total Checks Under \$1,000</b>	\$2,392.60			
<b>Total Checks</b>	\$2,392.60			

**SunLine Services Group**  
**CONSENT CALENDAR**

DATE: June 25, 2025

**APPROVE**

TO: Taxi Committee  
Board of Directors

RE: Acceptance of Taxi Trip Data – April 2025

Summary:

The attached charts summarize the total number of taxi trips generated in the Coachella Valley for the previous three (3) month period and total taxi trips for the current fiscal year to date (FYTD) compared to the last two (2) fiscal years.

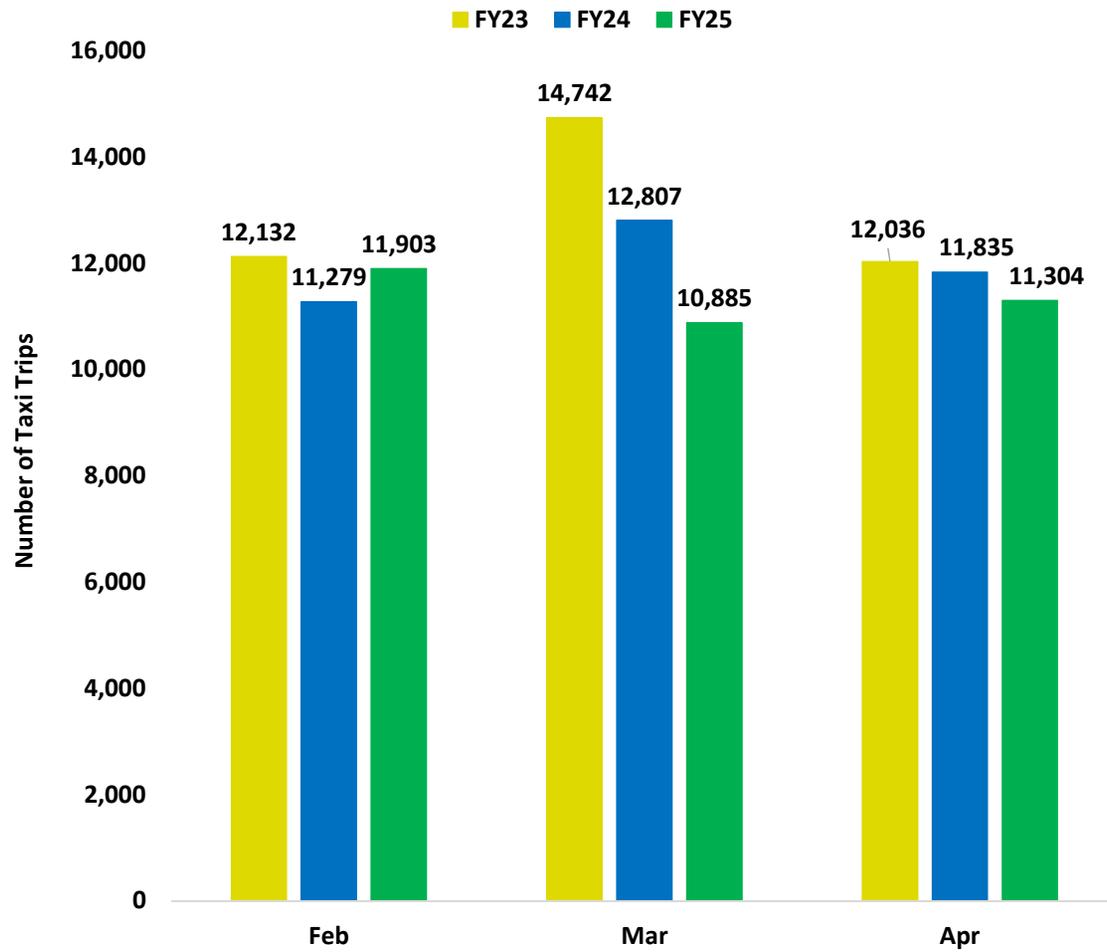
For the month of April, there were 531 fewer taxi trips in April 2025 serviced by 14 more cabs when compared to April 2024 (87 cabs in 2025 compared to 73 cabs in 2024).

There were 4,525 fewer taxi trips for FYTD25 compared to FYTD24.

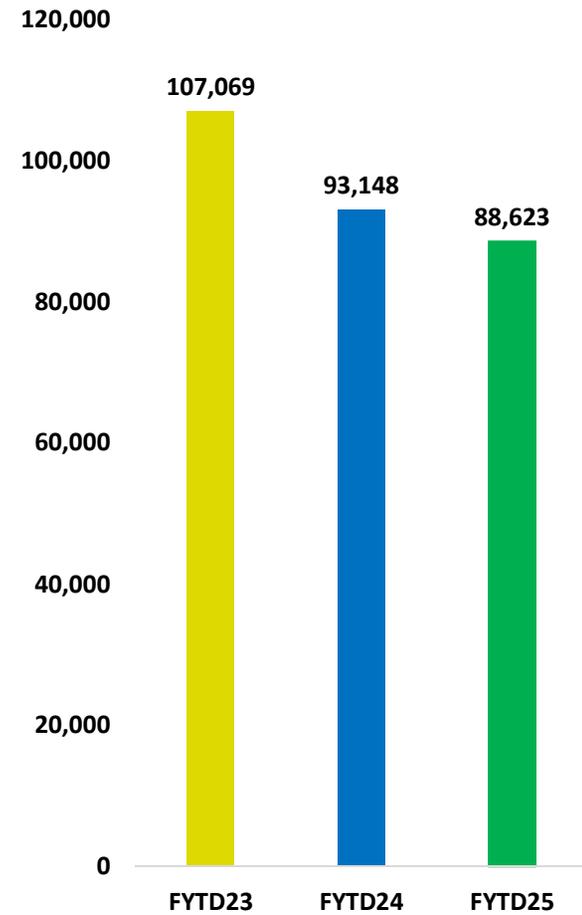
Recommendation:

Approve.

### Taxi Trip Three (3) Month Comparison as of April 2025



### FYTD No. of Taxi Trips



This chart compares the three (3) most recent months and measures the total number of taxi trips taken year to date for FY23, FY24, and FY25.

**SunLine Services Group**  
**CONSENT CALENDAR**

DATE: June 25, 2025 **APPROVE**

TO: Taxi Committee  
Board of Directors

RE: Acceptance of Monthly Budget Variance Report for April 2025

Summary:

The budget variance report compares revenues and expenses to the respective line item budgets. The report identifies current monthly revenues and expenses as well as fiscal year to date (FYTD) values. The budgetary figures are represented as a straight line budget. Accordingly, the current monthly budget values are calculated by taking 1/12<sup>th</sup> of the annual budget. The FYTD budget values for the month of April 2025 are equal to 10/12<sup>ths</sup> of the yearly budget.

Year to Date Summary

- As of April 30, 2025, the organization's revenues are \$49,695 or 31.45% above the FYTD budget.
- As of April 30, 2025, expenditures are \$40,646 or 25.73% below the FYTD budget.
- The net FYTD operating gain (loss) after expenses is \$90,341.

Recommendation:

Approve.

SunLine Regulatory Administration  
Budget Variance Report  
April 2025

Description	FY25 Total Budget	Current Month			Year to Date			
		Actual	Budget	Positive (Negative)	FYTD Actual	FY25 FYTD Budget	Positive (Negative)	Percentage Remaining
<b>Revenues:</b>								
Revenue Fines	3,500	100	292	(192)	1,425	2,917	(1,492)	59.3%
New Driver Permit Revenue	750	150	63	88	1,650	625	1,025	-120.0%
Taxi Business Permit	96,000	13,835	8,000	5,835	105,028	80,000	25,028	-9.4%
Driver Transfer Revenue	125	-	10	(10)	275	104	171	-120.0%
Driver Renewal Revenue	1,725	150	144	6	2,050	1,438	613	-18.8%
Driver Permit Reinstatement/Replacement	-	-	-	-	30	-	30	0%
Vehicle Permit Revenue	86,000	6,375	7,167	(792)	97,237	71,667	25,570	-13.1%
Operator Application Fee	1,500	-	125	(125)	-	1,250	(1,250)	100.0%
<b>Total Revenue</b>	<b>189,600</b>	<b>20,610</b>	<b>15,800</b>	<b>4,810</b>	<b>207,695</b>	<b>158,000</b>	<b>49,695</b>	<b>31.5%</b>
<b>Expenses:</b>								
Salaries and Wages	88,369	3,755	7,364	3,609	41,660	73,641	31,980	52.9%
Fringe Benefits	61,290	2,359	5,108	2,748	20,101	51,075	30,974	67.2%
Services	18,315	5,811	1,526	(4,285)	38,478	15,263	(23,215)	-110.1%
Supplies and Materials	3,585	1,118	299	(819)	12,052	2,988	(9,064)	-236.2%
Utilities	5,802	-	484	484	-	4,835	4,835	100.0%
Casualty and Liability	5,589	-	466	466	-	4,658	4,658	100.0%
Taxes and Fees	50	-	4	4	-	42	42	100.0%
Miscellaneous	6,600	3,190	550	(2,640)	5,063	5,500	437	23.3%
<b>Total Expenses</b>	<b>189,600</b>	<b>16,233</b>	<b>15,800</b>	<b>(433)</b>	<b>117,354</b>	<b>158,000</b>	<b>40,646</b>	<b>25.7%</b>
<b>Total Operating Surplus (Deficit)</b>	<b>\$ -</b>	<b>\$ 4,378</b>			<b>\$ 90,341</b>			

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**Revenue**

- The positive variance in revenue is largely due to increases in vehicle permit revenue and taxi business permit revenue due to one (1) unanticipated additional taxi business for FY2!
- As of FYTD25, there is a decrease of 4,525 taxi trips compared to FYTD24.

**Taxi Trips**

	FY24-April	FY25-April	Variance	%Δ
Trips	11,835	11,304	(531)	-4.5%

**Taxi Trips**

	FYTD-FY24	FYTD-FY25	Variance	%Δ
Trips	93,148	88,623	(4,525)	-4.9%

**Salaries and Wages**

- Wage expenses are below budget due to reduced costs allocated to SRA

**Fringe Benefits**

- Fringe benefit expenses are favorable due to reduced costs allocated to SRA

**Services**

- The unfavorable variance is due to higher costs for legal services

**Supplies and Materials**

- Supplies and material expenses are over unfavorable due to an allocation of overhead expenses from SunLine Transit Agency to SunLine Regulatory Administrator

**Utilities**

- Utility expenses are within an acceptable range of the budget

**Casualty and Liability**

- Casualty and liability expenses are within an acceptable range of the budget

**Taxes and Fees**

- Tax expenses are within an acceptable range of the budget.

**Miscellaneous**

- Miscellaneous expenses are within an acceptable range of the budget

**SunLine Services Group**

**CONSENT CALENDAR**

DATE: June 25, 2025

**APPROVE**

TO: Taxi Committee  
Board of Directors

RE: Acceptance of the 2025 Music Festival Season Report

Summary:

The 2025 music festival season that featured the Coachella and Stagecoach music festivals were held this past April. This year, there were 439 trips covered by an average of 64 taxicabs. This is an increase of 28% when compared to 2024. Flywheel supported 3.4% of the total rides in its inaugural year.

There were, on average, 85 taxicabs in service for calendar year-to-date April 2025, which is up 16% compared to the same time period of 2024 (January – April). On average, there were 21 cabs in 2025 that serviced the music festival, representing 25% of the total cabs available for service.

During the 2025 music festival season, Lot 13A, the "Friends & Family and Taxi" lot served as an ideal location. However the lot was challenging as taxis continued to compete with alternate rideshare services, including transportation network companies, private car services, unpermitted vehicles, and shuttle services. There are five (5) "lanes" to which transportation providers, including friends and families, queued in to receive rides within 13A; taxicabs were placed in the lane farthest away from the lot entry thus reducing access to potential riders.

SunLine Regulatory Administration will encourage the taxi businesses to work with the City of Indio and event organizers, Golden Voice, during the preliminary planning stages in an effort to secure a more favorable and convenient pick-up location for facilitating increased ridership at future music festivals.

Attachment:

- 2025 Music Festival Season Report Presentation

Recommendation:

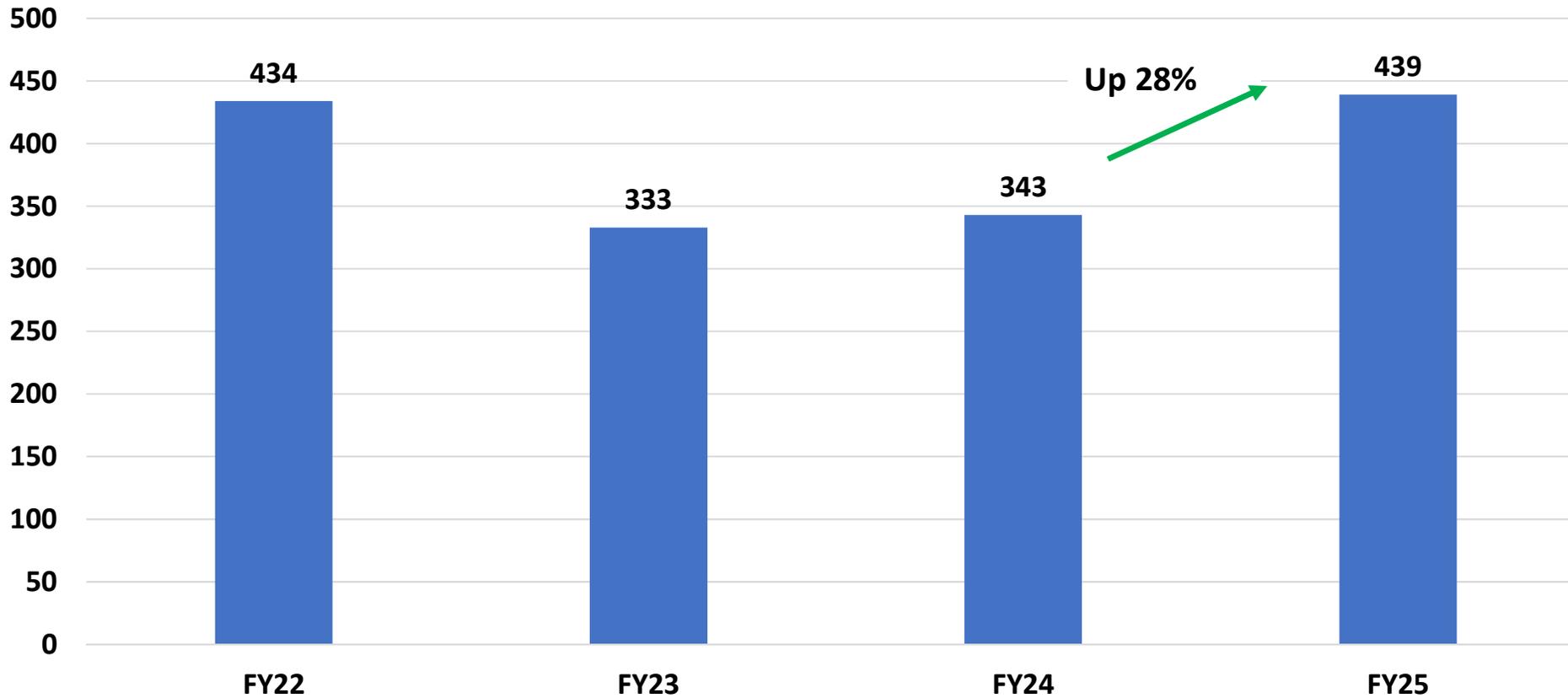
Approve.



**2025 Music Festival Season Report**  
**June 25, 2025**

# Total Trips Completed Comparison

Trips Comparison  
Music Festivals

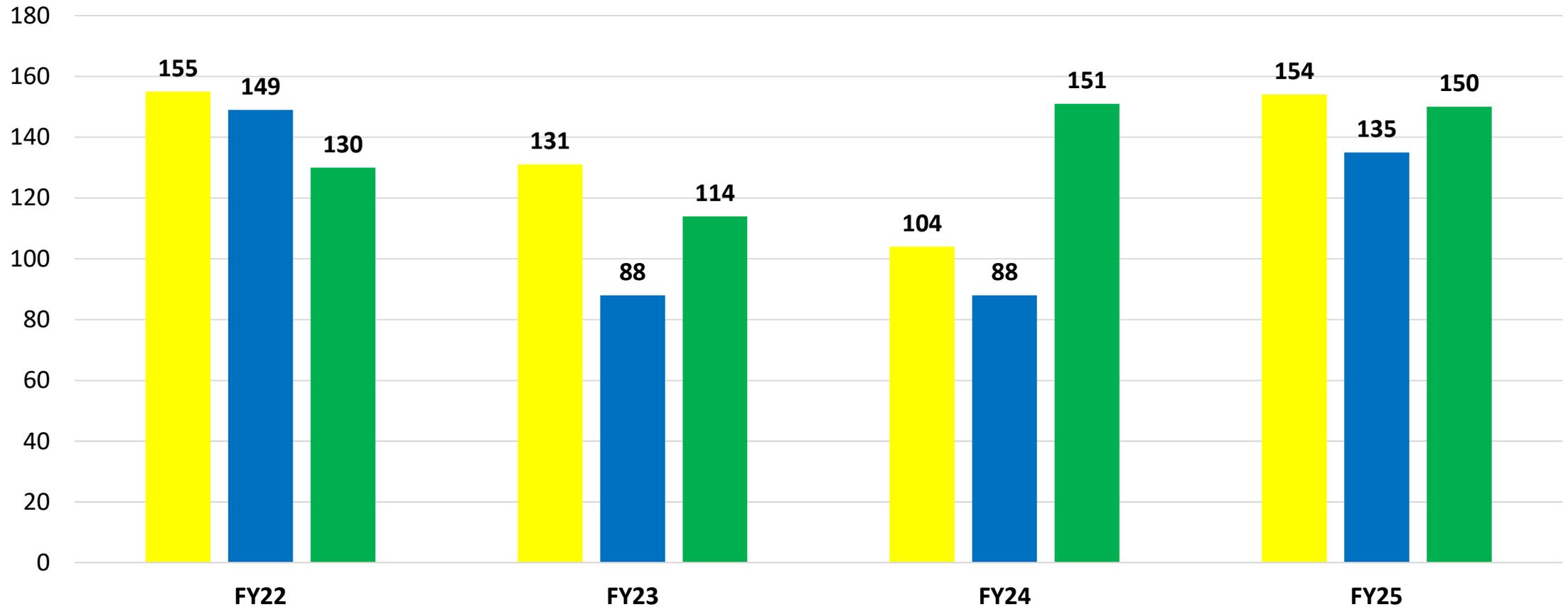


3.4% of all trips were booked using the Flywheel app

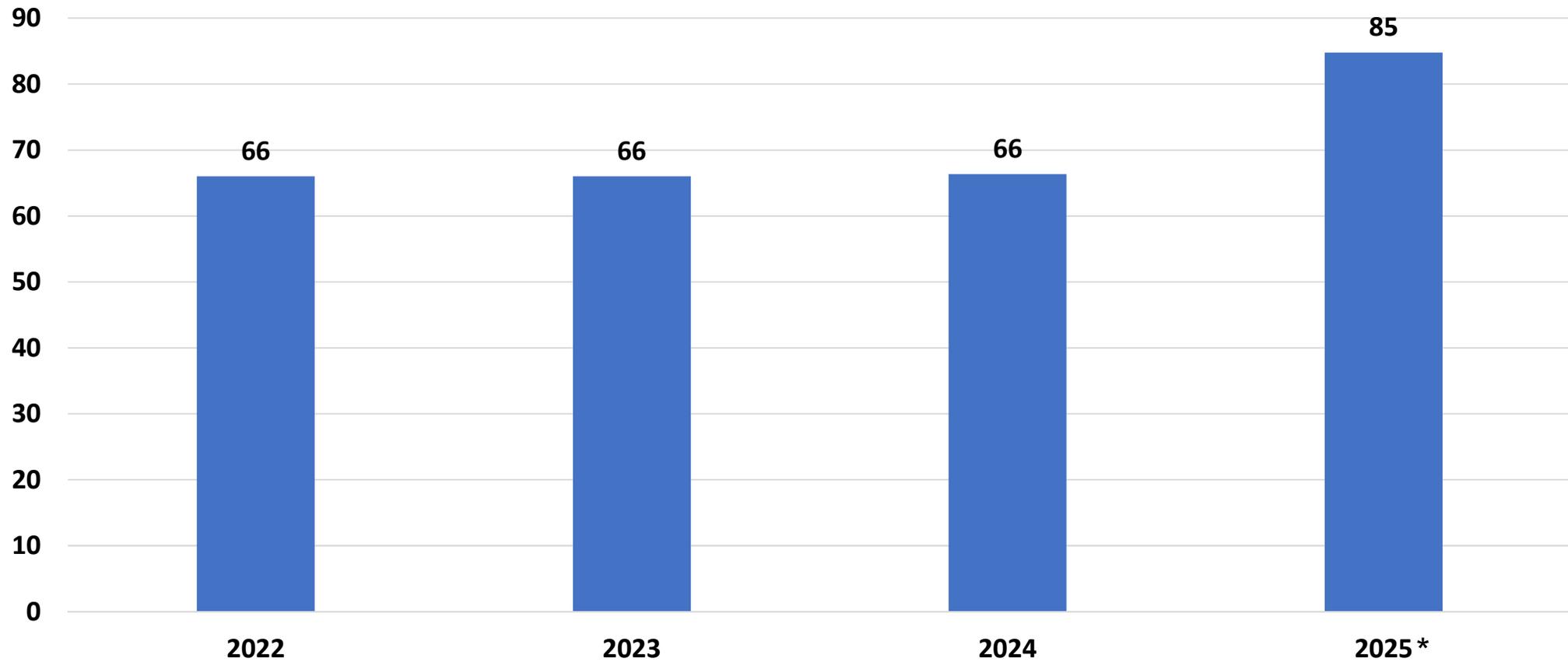
# Trip Comparison by Weekend

## Music Festival Taxi Trips

■ Coachella Weekend 1   ■ Coachella Weekend 2   ■ Stagecoach Weekend 3



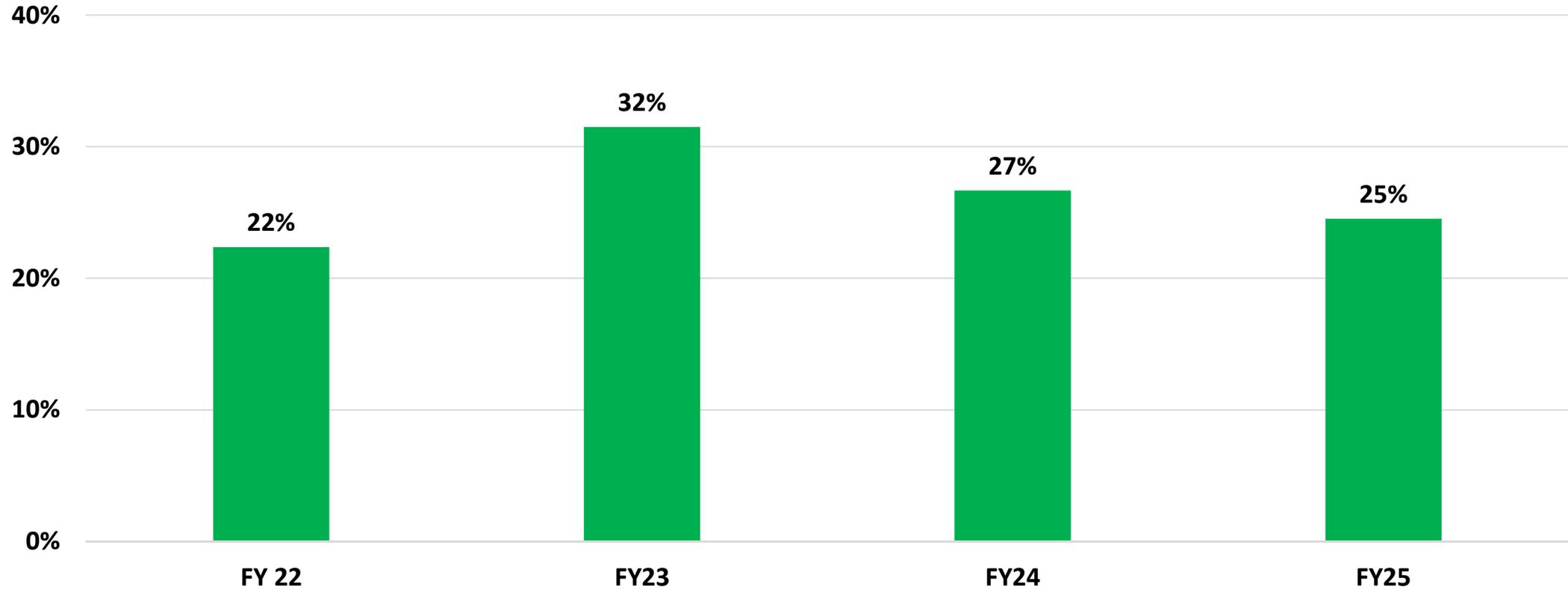
## Calendar Year Comparison of the Average Number of Taxicabs Serving the Coachella Valley



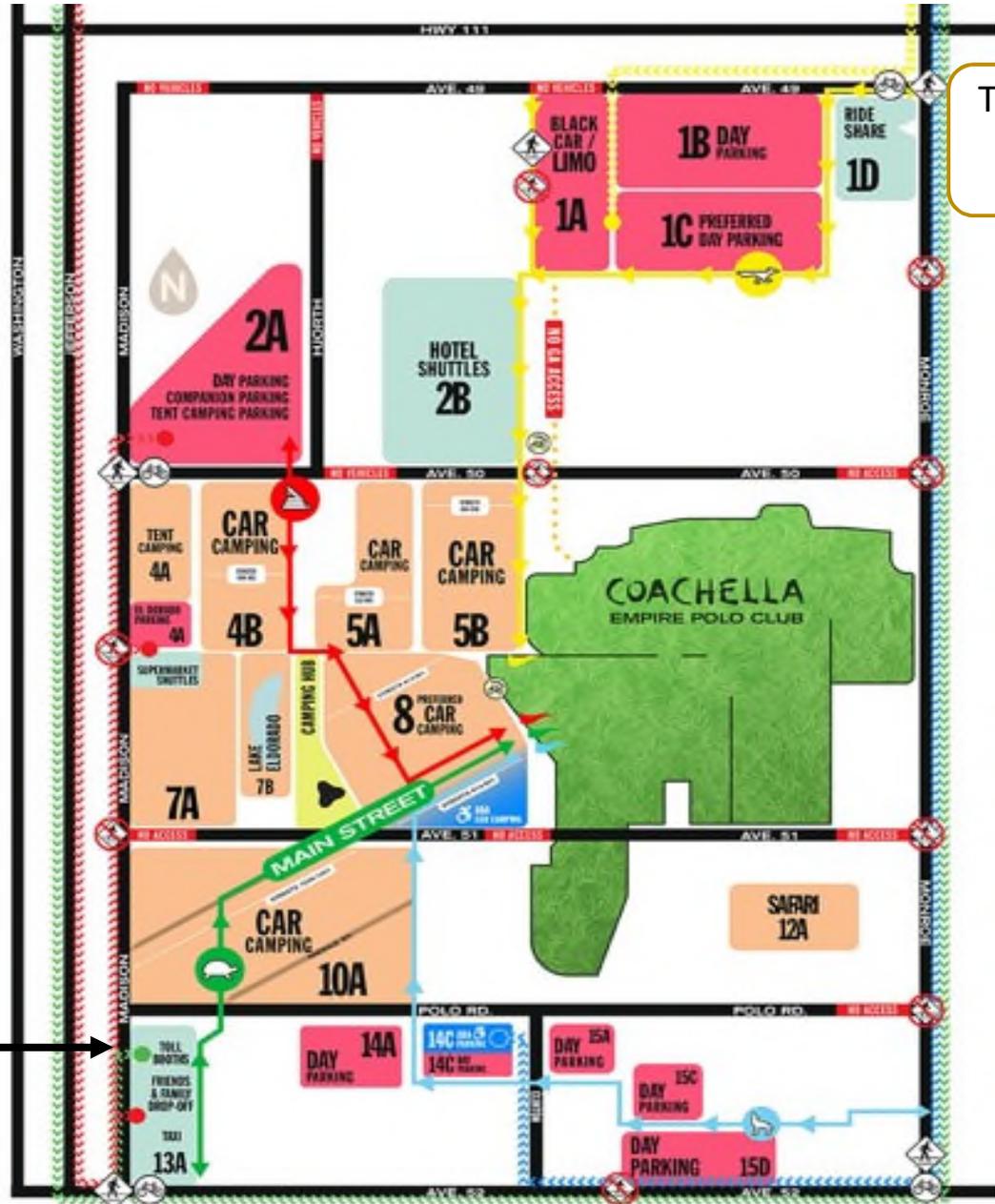
\* Calendar year to date 2025 reflects data through April 2025.

## Percentage of Total Available Taxicabs Servicing the Music Festivals

■ % of Available Taxicabs



Taxi Lot before pandemic  
49<sup>th</sup> & Monroe  
(Rideshare area)



Taxi Lot after pandemic  
52<sup>nd</sup> & Madison  
REAR OF LOT 13A  
Lot shared with Uber as well



## SunLine Transit Agency

<b>DATE:</b>	June 25, 2025	<b>ACTION</b>
<b>TO:</b>	Finance/Audit Committee Board of Directors	
<b>FROM:</b>	Paul Mattern, Chief Planning Officer	
<b>RE:</b>	Award of Contract for Comprehensive Operational Analysis Services	

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### **Recommendation**

Recommend that the Board of Directors (Board) delegate authority to the CEO/General Manager, or designee, to negotiate and execute a two (2) year agreement with Jarrett Walker & Associates, LLC (JWA) for the completion of a Comprehensive Operational Analysis (COA) for SunLine Transit Agency (SunLine), in an amount not-to-exceed \$535,959, which includes a base contract amount not-to-exceed \$473,452 and an optional fare structure analysis not-to-exceed \$62,507, in a form approved by legal counsel.

### **Background**

A COA is a data-driven evaluation of a transit agency's fixed-route services. It assesses system performance, operational efficiency, and alignment with current and anticipated travel patterns. The goal of a COA is to identify actionable opportunities to improve service design, enhance customer experience, and maximize the effectiveness of available resources.

Transit agencies typically conduct a COA every five to ten years, or following major changes in ridership trends, land use, or funding availability. A COA helps ensure that transit service reflects evolving community needs, supports regional mobility goals, and responds to emerging travel behaviors. It also lays the groundwork for other planning efforts, such as short-range transit plans or major service restructurings.

SunLine last completed a COA in 2019, and since that time, SunLine's service area has experienced significant changes, including a global pandemic, shifting travel patterns, and rapid growth in the Coachella Valley. Staff determined that a new COA will allow SunLine to re-align its service with current conditions and plan strategically for the future.

On January 6, 2025, SunLine released a competitive Request for Proposal (RFP) for COA services. SunLine received three responses, conducted interviews with the three proposers, and accepted best and final offers on May 1, 2025.

Through the interview process SunLine has been able to assess that JWA is the best firm qualified to conduct the COA. Jarrett Walker, JWA's founder and Principal Consultant and author of Human Transit, has over thirty years of experience in consulting for transit agencies. JWA is nationally recognized for its leadership in transit planning and its pioneering work in transit network design. Their approach is data-driven, equity-focused, and centered around public engagement. As part of their proposal, JWA will partner with Kearns & West, a nationally recognized firm specializing in collaboration, facilitation, and strategic communications. Kearns & West will lead the community engagement component of the COA.

What sets this engagement approach apart is the deep local connection of the Kearns & West team assigned to this project. Two of the associates leading the effort are Coachella Valley natives, one from North Shore and the other from La Quinta, and both continue to maintain close family ties in the region.

This local insight, combined with Kearns & West's proven facilitation skills and JWA's technical expertise, ensures the COA process will be both extensive and rooted in the lived experiences of Coachella Valley residents.

The time expected to complete the COA and submit the final report is sixteen months. The term of the contract, if awarded, would be for two (2) years. In the RFP solicitation, staff requested pricing related to an analysis of fares in addition to the typical COA activities. SunLine's fares were last amended in 2002, and the third party analysis could provide valuable information and insights relating to future of fares at SunLine. If determined to be of value to the agency, staff will make a recommendation to the CEO/GM to exercise the option for fare structure analysis.

An evaluation committee representing staff from the Operations and Planning departments evaluated the proposals and system offerings in accordance with the criteria listed in the RFP that include technical capability, functional requirement, price, risk performance, and demonstration. Staff found JWA's approach to the COA to align with SunLine's vision for the project. JWA demonstrated the technical expertise, provided relevant experience, focused on data-informed decision planning, and had an understanding of the regional nuances found in the Coachella Valley. SunLine completed the evaluation process and performed a price analysis and found JWA's price to be fair, reasonable, and the best value for SunLine.

### **Financial Impact**

The financial impact of \$535,959 is budgeted in SunLine's capital improvement program and is funded through State Transit Assistance funds. The table below details the COA activities and optional fare analysis outlined in the RFP proposal.

<b>Description of Activities</b>	<b>Hours</b>	<b>Cost</b>
Project Management	216	\$37,623
SunLine Staff and Local Leaders Report Out	112	\$19,040
Community and Stakeholder Outreach and Education Report Out	746	\$142,990
Data Collection Plan	184	\$30,517
Evaluation of Services Report Out	338	\$53,142
Latent Demand Analysis Report Out	176	\$24,158
Cost-Neutral Service Plan - Year 0	290	\$47,393
Service Plan: Year 0 - 10% to 20% Immediate Growth	188	\$31,824
Service Plan: Near-Term Service Recommendations (1-3 Years)	100	\$15,384
Service Plan: Medium-Term Service Recommendations (5-10 Years)	96	\$14,717
COA Report - Presentation of Findings	110	\$17,936
Implementation Plans	94	\$14,148
Optional: Fare Structure Analysis	440	\$62,507
Project Logistics	-	\$24,580
Totals	3,090	\$535,959

### **Performance Goal**

**Goal 2: Highly Trusted Mobility Solutions** - Strive to deliver highly accessible, convenient and trusted mobility solutions that effectively meet the diverse needs of Coachella Valley citizens and improve their connectivity to daily life needs.

#### **Approved/Reviewed by:**

Mona Babauta, CEO/General Manager  
Luis Garcia, Chief Financial Officer  
Catherine J. Groves, General Counsel

#### Attachments:

- [Item 9a](#) – Price Analysis
- [Item 9b](#) – Solicitation List



Comprehensive Operations Analysis  
Purchasing Justification  
25-048

Description	Jarret	Nelson	TMD
Project Management	\$ 37,623.00	\$ 31,152.00	\$ 37,081.53
STA & Local Leaders Report	\$ 19,040.00	\$ 25,473.00	\$ 24,268.90
Community & Stakeholder Outreach EDU	\$ 142,990.00	\$ 126,551.00	\$ 99,169.49
Data Collection Plan	\$ 30,517.00	\$ 3,648.00	\$ 10,972.19
Evaluation of Services Report	\$ 53,142.00	\$ 40,495.00	\$ 37,895.88
Laten Demand Analysis Report	\$ 24,158.00	\$ 10,882.00	\$ 35,575.14
Cost Neutral Service Plan	\$ 47,393.00	\$ 32,073.00	\$ 35,303.58
Immediate Growth Service Plan	\$ 31,824.00	\$ 8,019.00	\$ 29,301.36
Near Term Service Recommendation Plan	\$ 15,384.00	\$ 8,019.00	\$ 12,819.22
Medium Term Service Recommendation	\$ 14,717.00	\$ 8,019.00	\$ 12,819.22
COA Report - Presenting & Findings	\$ 17,936.00	\$ 24,850.00	\$ 44,899.36
Implementation Plans	\$ 14,148.00	\$ 14,867.00	\$ 26,074.93
Fare Structure Analysis	\$ 62,507.00	\$ 19,548.00	\$ 23,088.65
Fleet Replacement Strategy	-	\$ 23,032.00	\$ 34,000.47
Project Logistics	\$ 24,580.00	\$ -	\$ 21,120.00
<b>Total:</b>	<b>\$ 535,959.00</b>	<b>\$ 376,628.00</b>	<b>\$ 484,389.92</b>

Price Range Difference	\$ 159,331.00		
Percent Difference vs Average Price	115%		
Price Average	\$ 465,658.97		

The RFP process for COA was conducted through competitive bid. Three proposals were received from firms through Planet Bids. The SUM of the price difference within the average price is 16%. Based on these values we believe the bid was conducted fairly and that it is reasonable to assess the pricing is stable. Our evaluation committee comprised of Chief Planning Officer, Chief of Transportation, and CFO through the review of proposals and supplier interviews determined that Jarret Walker Inc. is the supplier best suited to meet the agencies needs. Jarret Walker provided a comprehensive proposal that included expert knowledge of the transit patterns within the Coachella Valley. It is for these reasons that the agency assesses that Jarret Walker Inc. will provide the best service for a price believed to be fair and reasonable and create the best value for the agency.

Prepared by:

  
Ray Stevens, Deputy Chief General Services

**PLANETBIDS SOLICITATION LIST Comprehensive Operational Analysis 25-048**

<b>Vendor Name</b>	<b>Address</b>	<b>City</b>	<b>State</b>	<b>Zip</b>	<b>Respondee</b>	<b>Respondee Email</b>
Jarrett Walker & Associates, LLC	1021 SE Caruthers Street	Portland	OR	97214	Zach Tucker	marketing@jarrettwalker.com
Nelson\Nygaard Consulting Associates, Inc.	2 Bryant Street, Suite 300	San Francisco	CA	94105	Jennifer Wieland	jwieland@nelsonnygaard.com
Transportation Management & Design, Inc..	2701 Loker Ave. W. Suite 110	Carlsbad	CA	92010	China Langer	clanger@tmdinc.net

## SunLine Transit Agency

**DATE:** June 25, 2025 **ACTION**

**TO:** Finance/Audit Committee  
Board of Directors

**FROM:** Luis Garcia, Chief Financial Officer

**RE:** Adoption of the Fiscal Year 2026 Operating and Capital Budget

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### **Recommendation**

Recommend that the Board of Directors (Board) adopt the proposed fiscal year 2026 (FY26) operating and capital budgets.

### **Background**

At the May Board meeting, staff presented the draft FY26 Operating and Capital Budget to the Board for discussion, in accordance with the SunLine Transit Agency (SunLine) Joint Powers Agreement. The Board reviewed the draft, and no questions or concerns were raised. A few minor, non-substantive edits were incorporated to address comments made during the discussion.

Staff is now presenting the final FY26 budget for approval. The proposed operating budget totals \$50,500,000, which reflects a responsible 2.19% increase over the prior fiscal year and maintains alignment with SunLine's long-term financial plan. The increase accounts for obligations under recently negotiated Memoranda of Understanding with employee unions, supports current service levels, and includes ongoing operational costs associated with SunLine's new liquid hydrogen fueling station.

The proposed capital budget totals \$36,447,800 and includes strategic investments to advance SunLine's Capital Improvement Program. FY26 capital priorities focus on enhancing rider experience, supporting long-term infrastructure needs, and initiating planning efforts to guide future service expansion and replacement of aging assets.

### **Financial Impact**

Multiple sources of revenues and subsidies have been identified to cover the expenses reflected in this year's operating and capital budgets.

**Performance Goal**

**Goal 3: Organizational Health & Resiliency** – Optimize SunLine’s fiscal and overall organizational strength to allow for growth and to better withstand unexpected challenges (e.g., COVID-19 financial impact).

**Approved/Reviewed by:**

Mona Babauta, CEO/General Manager

Catherine J. Groves, General Counsel

Attachment:

- [Item 10a](#) – FY26 STA Budget



FY 2026

# ANNUAL BUDGET



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# **SUNLINE TRANSIT AGENCY THOUSAND PALMS, CA**

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## **ANNUAL BUDGET FISCAL YEAR 2026**

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### **BOARD OF DIRECTORS**

Cathedral City: Nancy Ross, Chair  
Rancho Mirage: Lynn Mallotto, Vice Chair  
Coachella: Denise Delgado  
Desert Hot Springs: Daniel Pitts  
Indian Wells: Bruce Whitman  
Indio: Glenn Miller  
La Quinta: John Peña  
Palm Desert: Jan Harnik  
Palm Springs: Grace Garner  
Riverside County: V. Manuel Perez

**CHIEF EXECUTIVE OFFICER/GENERAL MANAGER**  
Mona Babauta

## **EXECUTIVE SUMMARY**

SunLine Transit Agency (SunLine) is the sole provider of public transportation in the Coachella Valley and plays a vital role in connecting people to opportunity across a service area that spans 1,120 square miles. Established in 1977 as a Joint Powers Authority (JPA), SunLine is governed by a Board of Directors consisting of elected representatives from nine cities and one Riverside County supervisor. With a service area extending from the San Geronio Pass to the Salton Sea, SunLine provides critical mobility options for over 411,000 residents—supporting daily travel for work, school, healthcare, and recreation.

## **SERVING A DIVERSE AND GROWING REGION**

The Coachella Valley is a uniquely diverse region encompassing a mix of urban, suburban, and rural communities. It includes nine cities—Cathedral City, Coachella, Desert Hot Springs, Indian Wells, Indio, La Quinta, Palm Desert, Palm Springs, and Rancho Mirage—as well as seven unincorporated communities such as Mecca, Thermal, and Thousand Palms. The region experiences significant seasonal population fluctuations driven by tourism and seasonal residents, and also includes high concentrations of seniors, students, low-income households, and agricultural workers who rely on transit for essential mobility.

An onboard survey conducted by SunLine found that:

- 85% of riders use SunLine frequently due to limited access to a personal vehicle;
- 66% of riders are under age 45;
- 60% of riders have annual household incomes below \$25,000;
- 44% of riders speak a language other than English at home, primarily Spanish.

Understanding the needs of these populations is central to SunLine’s planning and budget priorities.

## **TRANSIT SERVICES OVERVIEW**

SunLine provides a range of transportation options to meet the needs of its diverse community:

- SunBus (Fixed-Route Service): Nine local routes connect major corridors, residential areas, job centers, schools, and hospitals. Trunk routes provide frequent service along Highway 111, while connector routes serve less dense areas and ensure coverage across the valley.

- Route 10 Commuter Link: A regional express service linking Indio with San Bernardino, Route 10 connects passengers with the Metrolink system and other regional transit providers. It also serves students and staff traveling between CSUSB’s Palm Desert and San Bernardino campuses.
- SunRide (Microtransit): An on-demand, app-based ride service that operates in eight geo-fenced zones across the Valley, providing first-mile/last-mile connections and flexible mobility for riders in areas not served by fixed routes.
- SunDial (Paratransit): ADA-compliant, door-to-door service for individuals with disabilities or mobility challenges. SunDial operates within ¾ mile of fixed routes and includes eligibility screening and scheduled ride coordination.
- Taxi Voucher Program: A subsidy program that offers a dollar-for-dollar match up to \$75 per month for seniors and individuals with disabilities, increasing their access to affordable taxi transportation throughout the valley.

In Fiscal Year (FY) 2023–24, SunLine recorded a systemwide ridership of 2.75 million boardings, a 1.9% increase over the prior year. The ridership breakdown is as follows:

- SunBus: 2,585,789 boardings
- SunDial: 119,492 boardings
- SunRide: 22,435 boardings
- SolVan: 23,738 boardings

## **REVENUE FLEET**

SunLine is nationally recognized for its leadership in clean fuel technology. The agency is actively transitioning its fleet to meet the state’s Innovative Clean Transit (ICT) regulation, which requires all public transit agencies to operate a 100% zero-emission fleet by 2040. SunLine’s fleet includes compressed natural gas (CNG), hydrogen fuel cell electric buses (FCEB), and battery electric buses (BEB). Fixed-route vehicles are equipped with air conditioning, wheelchair access, bike racks, USB ports, and free Wi-Fi to ensure a comfortable and accessible rider experience.

## **FACILITIES AND INFRASTRUCTURE**

SunLine operates from two primary facilities:

- Division I (Thousand Palms): Headquarters for administration, operations, maintenance, and fueling (CNG, hydrogen, electric).
- Division II (Indio): Satellite maintenance and fueling facility with public CNG fueling services.

The agency also maintains two regional transit hubs:

- Thousand Palms Hub: Serves as a park-and-ride and boarding location for Route 10 commuters.
- Coachella Mobility Hub: Opened in 2024 to improve access to transit for residents in eastern Coachella Valley communities, especially those in affordable housing developments.

Across its network, SunLine manages over 571 bus stops, with amenities such as benches, shelters, ADA-compliant access, and waste receptacles.

### **FARE STRUCTURE AND ACCESSIBILITY**

SunLine maintains one of the most affordable fare structures in the region. Adult fares for local fixed-route services are \$1, with half-price discounts for seniors (60+) and persons with disabilities. Route 10 Commuter Link fares are \$6, with discounted rates for qualifying populations. SunRide trips are priced at \$3 and include transfers to fixed-route buses.

Fare payment options include:

- Cash
- Mobile ticketing through Token Transit and Transit App
- Prepaid passes (Day Pass, 31-Day Pass, 10-Ride Pass)
- Specialized programs like the Haul Pass (free student fares) and Employer Pass (discounted employee fares)

The agency continues to explore fare innovations, including fare-free models, to improve access and ridership.

### **PLANNING AND PERFORMANCE STANDARDS**

SunLine's operations are guided by a Service Standards Policy adopted by the Board and updated in 2023. These standards ensure that service is responsive, equitable, and efficient. Key targets include:

- 85% on-time performance for fixed routes
- 99% of scheduled service completed
- Minimum productivity of 20 passengers per revenue hour on trunk routes and 10 on local routes

These metrics are regularly evaluated through the agency’s Short-Range Transit Plan (SRTP), overseen by the Riverside County Transportation Commission (RCTC), which coordinates transit planning and funding for the region.

The agency’s service allocation policy aims to:

- Deploy 70% of service hours in areas with high population and employment densities
- Maintain 30% of service to ensure coverage in rural and low-density areas

SunLine serves numerous communities identified as SB 535 Disadvantaged Communities and Areas of Persistent Poverty—neighborhoods prioritized for public investment due to socioeconomic and environmental burdens. By aligning with California’s climate and equity goals, SunLine actively pursues state and federal funding to improve mobility and air quality for vulnerable populations.

### **UNCERTAIN FUNDING CONCERNS**

SunLine Transit Agency is facing significant financial uncertainty due to proposed reductions in state transit capital funding included in the Governor’s May 2025 Revision to the Cap-and-Invest (formerly Cap-and-Trade) program. If enacted, these changes could result in a funding loss exceeding \$50 million for SunLine over the next several years. Impacted allocations include:

- **\$1.9 million** in FY24 operating funds for expanded service in North Coachella Valley;
- **\$2 million** in FY25 capital funds for development of a solar microgrid;
- **\$40 million** in SB 125 capital investments for a new maintenance facility, expanded solar infrastructure, and a workforce development center;
- **\$10 million** in projected losses from FY26–30 based on historical LCTOP allocations.

These are not speculative projects — they are already funded or in active development phases and support critical initiatives including zero-emission fleet transition, renewable energy infrastructure, and expanded transit access for underserved communities. Reduced funding threatens SunLine’s ability to meet state-mandated climate and equity goals, placing shovel-ready projects and long-term service plans at risk.

SunLine has strongly urged the Governor and Legislature to maintain previously committed investments from the Greenhouse Gas Reduction Fund (GGRF) through 2030 and to increase future support for public transit agencies. Sustained state partnership is vital to advancing clean transportation, workforce development, and equitable mobility throughout the Coachella Valley.

## **REVENUES & SUBSIDIES**

SunLine is required to meet a performance standard known as a farebox recovery ratio in order to avoid funding issues with state funding. Although farebox revenue has decreased compared to revenues prior to COVID-19, SunLine's budget is still compliant with the farebox requirement outlined in the Transportation Development Act.

The proposed revenues for FY26 consist of a mix of passenger fares, federal, state, local funding, and other revenues with the main assumptions being as follows:

- The utilization of Local Transportation Funding (LTF) has an increased for FY26 due to an overall increase in available LTF funding throughout the state which is driven by sales taxes.
- Following a significant downturn in ridership in March 2020 related to the COVID-19 pandemic, SunLine has experienced an increase in passenger revenue which aligns with projected ridership increases.
- In August 2018, SunLine launched its Haul Pass Program to improve student access to Coachella Valley's colleges and university. Both the College of the Desert (COD) and the California State University, San Bernardino (CSUSB) Palm Desert Campus are partners. COD and CSUSB underwrite the cost of the passes for their students. In FY22, Sunline expanded the program to include high school students. The Haul Pass program for high school students is funded through a grant from the Low Carbon Transit Operations Program (LCTOP).

## CAPITAL PROJECTS

The capital budget incorporates key projects to help further advance the Agency’s Capital Improvement Program (CIP). The CIP for FY26 focuses on riders, replacing employee equipment and facilities and continuing SunLine’s investment in alternative fuel technology for vehicles and infrastructure.

### **New Projects**

There are 34 new capital projects being planned for FY26 for a total amount of \$36.4M which include new projects, proposed projects with competitive grant submittals and re-assignment of funds for existing projects. These projects represent an emphasis on innovation while aligning with the Agency’s Board approved Innovative Clean Transit (ICT) plan. The requests in FY26 will be in addition to the existing CIP. These projects cover the replacement of aging facilities and equipment. They support replacement and rehabilitation of existing assets as well as continue the advancement of alternative fuel technology. The most notable new projects for FY26 include investments in facilities, buses and equipment required to properly replace the Agency’s aging assets.

Project Description	Capital Project Number	Total Amount of Funds
Buildings and Facilities - Solar Microgrid to Hydrogen	SL-26-01	\$11,536,134
Buildings and Facilities - Solar Paneled-Covered Parking and EV Chargers Infrastructure Phase	SL-26-02	6,000,000
Buildings and Facilities - Indio Liquid Hydrogen Station	SL-26-03	6,000,000
Buildings and Facilities - Workforce Training Center	SL-26-04	3,716,667
Buildings and Facilities - Div 1 Backup Generator	SL-26-05	1,700,000
Operator's Training Ground	SL-24-07	(998,107)
Facility Maintenance Upgrade & Equipment	SL-24-13	(363,000)
Operations Facility Replacement Phase 2	SL-20-11	(186,893)
Refurbished Hydrogen Fueling Station	SL-16-03	(152,000)
Buildings and Facilities - Replacement Bus Wash	SL-26-06	1,200,000
Buildings and Facilities - Facility Maintenance Upgrade & Equipment	SL-26-07	400,000
Buildings and Facilities - Office Furniture and Equipment	SL-26-08	82,000
Communication and Intelligence Transportation Systems - IT Projects	SL-26-09	735,850
Bus Stop Improvement	SL-22-08	(28,680)
Bus Stop Improvement	SL-23-12	(240,000)
Bus Stop Improvement	SL-24-14	(320,000)
Maintenance Equipment - Specialized Tools and Fueling Equipment	SL-26-10	200,000
Non-Revenue Vehicles - Replacement of Support Vehicles	SL-26-11	500,000
Project Management and Administration	SL-26-12	200,000
Revenue Vehicles - Purchase of Hydrogen Fuel Cell Electric Buses (12)	SL-26-13	17,797,756
Purchase of Hydrogen Fuel Cell Bus (3)	SL-24-01	(2,305,012)
Purchase of Hydrogen Fuel Cell Bus (4)	SL-24-05	(3,149,403)
Purchase of Electric Bus (6)	SL-24-03	(8,743,963)
Hydrogen Electric Hybrid Fuel Cell Bus (FY13-LoNo Match)	SL-17-09	(382,147)
Replacement Fixed Route Bus (3) (Purchase Fuel Cell)	SL-20-01	(649,088)
Purchase Fuel Cell Bus (1)	SL-21-02	(449,250)
Expansion (1) Fixed Route Bus (Low/No Emission)	SL-17-10	(449,975)
Expansion One (1) CNG Motor Coach Bus	SL-22-01	(45,857)
Revenue Vehicles - Purchase of Replacement CNG Paratransit Vehicles (14)	SL-26-14	3,500,000
Revenue Vehicles - Bus Rehabilitation	SL-26-15	300,000
Safety and Security - Safety Enhancements	SL-26-16	150,000
Transit Shelters & Amenities - Bus Stop Improvement	SL-26-17	200,000
Vehicle Systems and Equipment - Open Loop Contactless Fare Payment System	SL-26-18	642,768
Vehicle Systems - Vehicle Equipment	SL-26-19	50,000
7	<b>Sub-total Capital</b>	\$36,447,800

## Existing Projects

The following table represents the Agency’s existing capital program. The new capital projects proposed for FY26 would be in addition to the projects identified below.

Project	Project Description	Project Status	Total Project Funding Balance
<b>Vehicles &amp; Vehicle Improvements</b>			<b>\$ 34,418,167</b>
Purchase of Hydrogen Fuel Cell Bus (7)	Purchase of replacement fixed route vehicles to replace buses that have exceeded their useful life of 12 years of 500,000 miles.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	5,920,303
Purchase of Battery Electric Buses (6)	Purchase of replacement fixed route vehicles to replace buses that have exceeded their useful life of 12 years of 500,000 miles. The competitive funding for the buses and included electrical chargers were awarded to the agency as part of a competitive Low Now funding application.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	7,064,109
Purchase of Hydrogen Fuel Cell Electric Bus (1)	Purchase of replacement fixed route vehicle to replace buses that have exceeded their useful life of 12 years of 500,000 miles.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	1,100,000

Purchase of Fuel Cell Bus (1)	Purchase of replacement fixed route vehicle to replace buses that have exceeded their useful life of 12 years of 500,000 miles.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	768,000
Purchase of Fuel Cell Bus (1)	Purchase of replacement fixed route vehicle to replace buses that have exceeded their useful life of 12 years of 500,000 miles.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	649,088
Replacement of Fixed Route Bus (CNG)	Purchase of replacement fixed route vehicle to replace buses that have exceeded their useful life of 12 years of 500,000 miles.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	450,304
Expansion Fixed Route Bus (Fuel Cell)	Purchase of expansion fixed route vehicle.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	382,147
Expansion Fixed Route Bus (Motor Coach)	This project will allow the purchase of one (1) additional MCI bus to meet the needs of the Agency.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	45,857

<b>Sub-total Fixed Route Vehicles</b>			<b>16,379,808</b>
Purchase of Paratransit Vehicles (15)	This project will allow the replacement of fifteen paratransit vehicles that have met their useful life.	Project not started.	3,600,000
Purchase of Paratransit Vehicles (10)	This project will allow the replacement of ten (10) paratransit vehicles that have met their useful life.	Project initial delayed due to CARB certification of CNG engine. Paratransit vehicles delivered in early calendar year 2025.	2,309,592
<b>Sub-total Demand Response Vehicles</b>			<b>5,909,592</b>
Micro Transit Expansion (4)	This project will allow the procurement of two (2) micro transit Chrysler Voyager vehicles that are ADA accessible.	Both vehicles have been received and the project is closed.	170,576
H2 Vehicle Demonstration	This project will support the make ready costs for the demonstration of four (4) 22-foot hydrogen fuel cell vehicles. Vehicles to be demonstrated in Agency service including the ability to assign to microtransit.	All four (4) vehicles have been delivered but are not yet ready to be placed into service.	33,556
<b>Sub-total Micro Transit Vehicles</b>			<b>204,132</b>

Purchase of Stops & Zones CNG Trucks (3)	Purchase of three (3) support trucks to replace the current vehicles that have met their useful life.	The vehicles have been manufactured but are waiting CARB certification for the CNG conversion before the vehicles are completed and delivered to SunLine.	183,383
Purchase of Shop Service CNG Vehicle (1)	This project is for the purchase of a shop service vehicle to support the Maintenance and Transportation departments.	The vehicles have been manufactured but are waiting CARB certification for the CNG conversion before the vehicles are completed and delivered to SunLine.	159,400
Purchase of Administrative Vehicles (2)	This project is for the purchase of two (2) support vehicles.	Project not started.	119,971
<b>Sub-total Support Vehicles</b>			<b>462,754</b>
CNG Bus Refurbishments (12)	Refurbishment of 12 CNG buses to extend their useful life. This will allow time to obtain zero emission replacement buses.	FTA has approved the project scope change in the model year of buses to be refurbished. The project will begin in the second half of CY25.	5,300,607

Bus Rehabilitation	This project allocates funding to ensure that the Agency's vehicles remain in a state of good repair.	Project not started.	384,703
<b>Sub-total Bus Rehabilitation</b>			<b>5,685,310</b>
Upgrade ITS (CAD-AVL)	This project will allow the replacement of the ITS system for the fleet.	The contract award has been approved by the Board and the contract is expected to be executed in the second quarter of CY25 and the project completed by the end of CY25.	4,913,144
Radio System Replacements Phase 1 & Phase 2	This project will allow the replacement of the current radio system from analog to cellular services that will improve the day-to-day operational communications of SunLine's Transportation department.	The radios were installed at the end of CY24.	694,475
<b>Sub-total Radio Replacements</b>			<b>5,607,619</b>
Fare Collection Modernization (Study)	This project will allow the Agency to conduct a study of its fare collection mechanism and provide recommendations on new	Project not started.	100,000

	technology to replace the existing fareboxes.		
H1 Vehicle Demonstration	This project will support the make ready costs for the demonstration of one (1) hydrogen fuel cell vehicle.	Vehicle has been delivered but it is not yet ready to be placed into service.	68,952
<b>Sub-total Others</b>			<b>168,952</b>
<b>Facilities &amp; Stations</b>			<b>\$ 36,877,514</b>
Public Hydrogen Station Expansion	This project will allow the Agency to provide hydrogen to the public through 700 bar dispensers.	Project not started.	9,725,000
Liquid Hydrogen Refueling Infrastructure	The new liquid hydrogen station will include liquid storage, compression equipment, gaseous storage and dispensing, providing both additional capacity and resiliency for the existing fueling infrastructure. The new station will be capable of dispensing fuel at 350 and 700 bar.	Project is undergoing the final commissioning phase for the 700 bar dispensing.	1,271,704

Liquid Hydrogen Trailer	The new liquid hydrogen station in Indio would allow the Agency to fuel hydrogen fuel cell buses on the East end of the Valley and provide an opportunity for the public to access hydrogen.	Utility upgrades are currently being planned and discussed with IID to support power requirements of new station and backup generator.	8,852,950
Center of Excellence	This project is for the construction of a facility to serve as a training center and maintenance bay for zero-emission vehicles.	Bids received were higher than what was originally anticipated by the project team. Staff is currently reviewing the scope and will look to allocate additional funding.	3,598,522
Microgrid to Hydrogen	The microgrid will utilize power generated through solar panels to stored onsite in batteries. The project will reduce operating costs and provide for additional resiliency from green power.	Land has been purchased. The next step is the planning phase for the solar panels.	3,513,789
Coachella Transit Hub	This project is in conjunction with a grant awarded to SunLine as part of the Affordable Housing Sustainability Community Grant. SunLine, along with the City of Coachella, will construct sustainable	The project has been completed.	11,692

		transportation infrastructure to provide transportation related amenities.		
Indio CNG Station Upgrade		The project will upgrade the existing equipment and CNG station in Indio.	Project not started.	2,277,000
Electrolyzer		This project deployed five (5) new 40-foot fuel cell electric buses along with the upgrade of SunLine's existing hydrogen refueling station with a new electrolyzer.	Contractor failed to meet site acceptance test by the December 2023 deadline. Staff is actively working on the next steps of the project.	737,198
Bus Stop Improvements		Bus stop improvements funds are utilized to replace and install new amenities in locations that meet the Agency's ridership and equity standards.	Project ongoing.	1,335,002
Operator's Training Ground		The project will allow the Agency to begin the initial stages of the plan to utilize its existing land to develop an area where operators can be trained on how to maneuver buses in a safe location.	Project not started.	998,107
Asphalt & Concrete Upgrade		The project will allow the Agency to maintain the asphalt and concrete at its	Project not started.	1,000,000

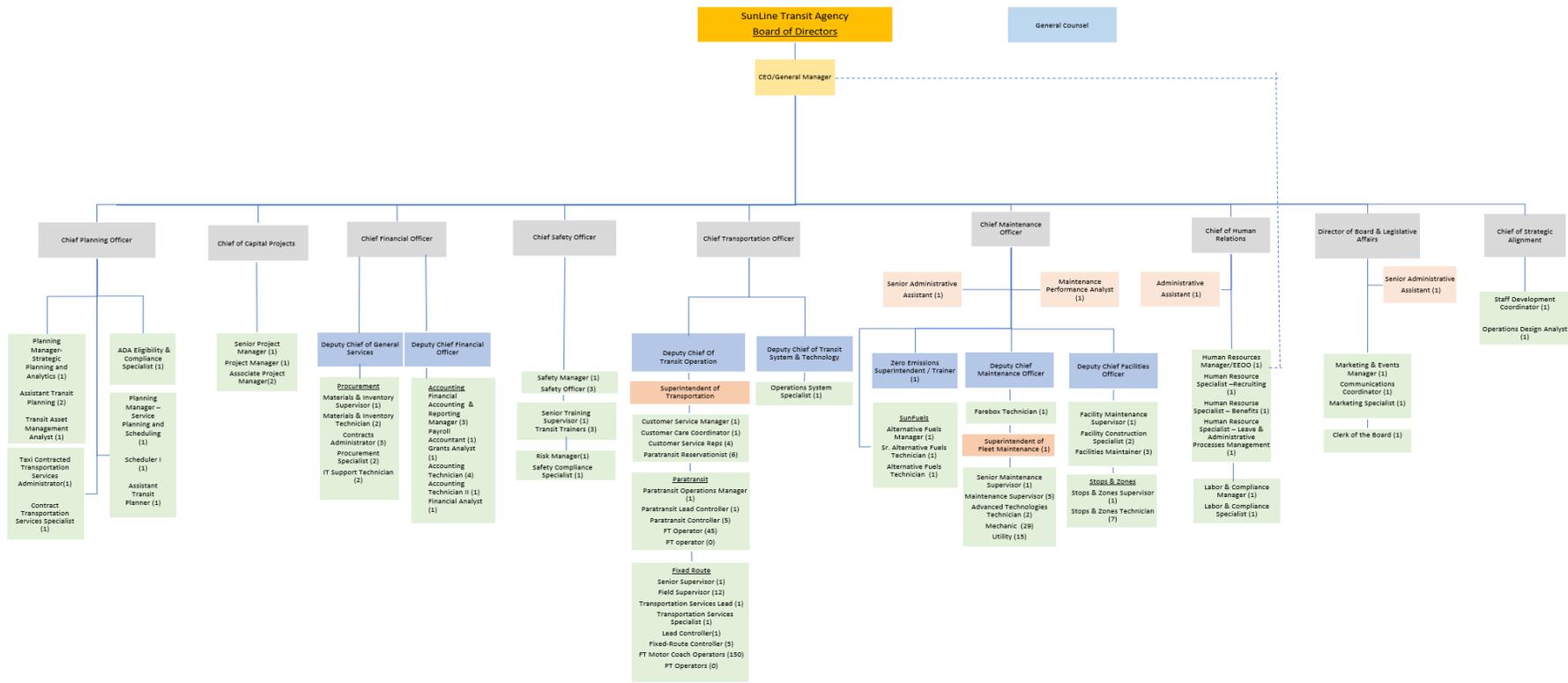
	Thousand Palms division in a state of good repair.		
Design & Construction of New Storage Building	This project would allow the Agency to construct a new pre-fabricated building for the Facility Maintenance staff.	Project not started.	800,000
Facility Maintenance Upgrade	This project will support the purchase of equipment and facility improvements.	Ongoing.	835,073
SoCal Gas Demonstration Project	SunLine, in partnership with the Southern California Gas Company, will install, test, monitor, and demonstrate a Steam Methane Reformer (SMR) in various operating conditions at SunLine's Thousand Palms facility.	Project has completed the demonstration period and the equipment is being removed by SoCal Gas.	480,761
Automatic Transfer Switch (ATS) T-1 & T-2	This project will upgrade the existing connection to the maintenance building by converting it to an automatic transfer switch and will connect the operations building to the backup generator.	Project being revised to replace existing generator with a new generator capable of supporting the new liquid hydrogen station as well as the operations and maintenance buildings. Environmental	240,179

		approvals are currently ongoing.	
Upgrade Gate and Guard Shack	This project will make upgrades to the existing entrance and guard shack at the main entrance to the Thousand Palms facility.	Project not started.	270,350
Facility Improvements	This project will support the purchase of facility improvements.	Ongoing.	322,000
Maintenance Facility Modernization (Study)	The project would assist the Agency conduct a study for future plans for the maintenance facility.	Project has been initiated.	200,000
Repair of Division 1 Maintenance Roof	The project will allow the Agency to make repairs to the roof in the maintenance shop at its Thousand Palms division.	Project not started.	200,000
Indio Facilities Improvements	The project would allow the Agency to make improvement and repairs to the Indio division property.	Ongoing.	79,159
Thousand Palms Facilities Improvements	This project will support the purchase of facility improvements.	Ongoing.	12,172

Upgrade Division 1 Fence	This project will allow the Agency to make upgrades to the fence surround the property at the Thousand Palms division.	Project not started.	36,856
Perimeter Lighting Division 1	Installation of perimeter lighting to enhance the safety and security of the Thousand Palms facility.	Project not started.	80,000
<b>Equipment</b>			<b>\$ 2,283,416</b>
Bus Chargers	Purchase of bus chargers to support the purchase for six (6) new electric buses. The competitive funding for the buses and included electrical chargers were awarded to the agency as part of a competitive Low Now funding application.	Project not started.	1,679,854
Tools & Equipment	This project will support the purchase of equipment needed in the maintenance department.	Project not started.	312,401
Miscellaneous Equipment	The project will allow the replacement of existing assets once they have met their useful life.	Project not started.	291,161
<b>Systems</b>			<b>\$ 2,536,808</b>

Project Management & Administration	This project allows the Agency to capitalize project management costs from third party contractors. Funding will be used when individual project costs do not allow for project management or do not have the budget to support project management.	Project is ongoing.	683,783
Software Expansion	This project would facilitate the Agency's need for software upgrades across its operations.	Project not started.	600,000
Information & Technology	The project focuses on the purchase of information technology equipment such as servers, switches and battery backup systems, desktop replacements.	Staff is working with new IT contractor to identify priority of Agency needs.	617,621
Transit Asset Management	This project will allow the purchase of an asset management tool for the Maintenance Department.	Software has been implemented and staff is working with vendor to close project.	53,759
Access Control Surveillance	This project will allow the procurement and installation of new access control systems around the Agency.	Project has been completed.	99,271

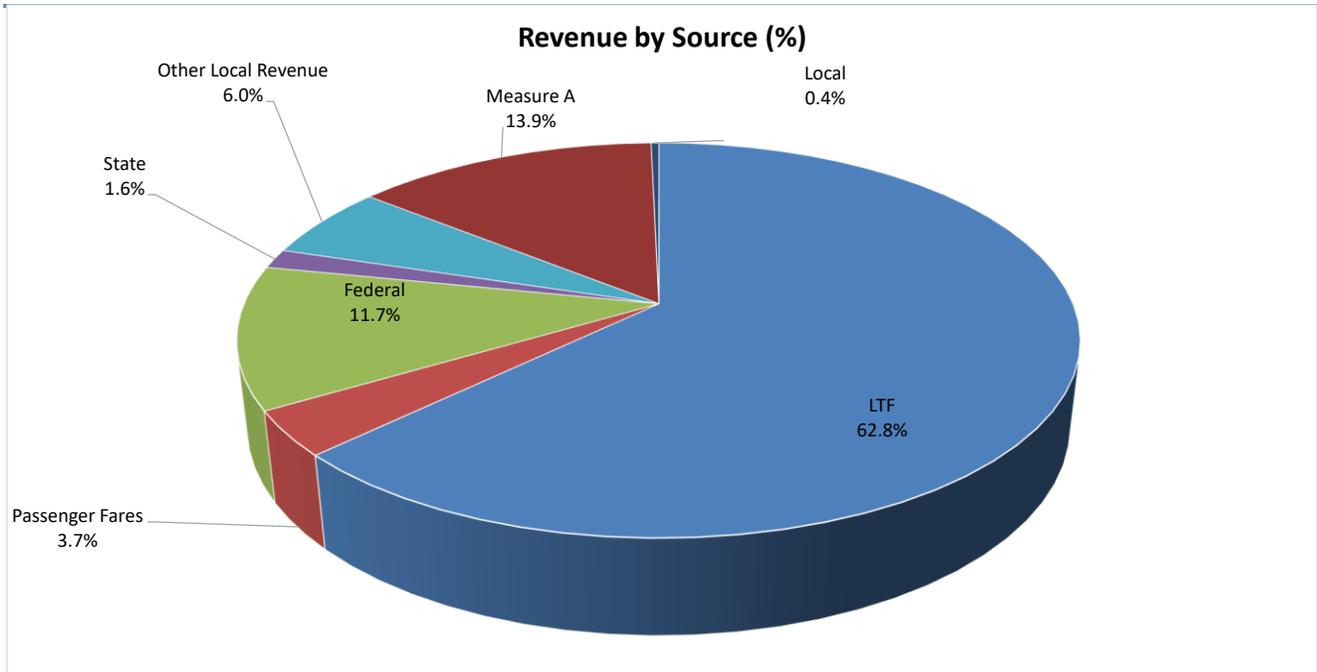
Safety Projects	This project will be allow the Agency to improve overall safety of its facilities by enhancing the perimeter fence, gates and surveillance.	Project not started.	250,000
Real Time Surveillance System	This project is to add real time video surveillance to all Agency support vehicles.	Contract award was approved by the Board at the April 2025 meeting.	90,000
Timekeeping Software Integration	This project is to replace an existing timekeeping interface between two software systems within the Agency.	Project has been completed.	82,374
Safety Enhancements	This project will be allow the Agency to improve overall safety of its facilities by enhancing the perimeter fence, gates and surveillance.	Project not started.	60,000
<b>Grand Total</b>			<b>\$ 76,115,905</b>



## AGENCY PERSONNEL SUMMARY

Department	FY25 Approved FTE's	FY26 Proposed Base FTE's	Variance
<b>EXECUTIVE OFFICE</b>			
Executive Office (40)	3.00	3.00	-
Marketing (31)	6.00	4.00	(2.00)
<b>HUMAN RESOURCES OFFICE</b>			
Human Resources (32)	9.00	8.00	(1.00)
<b>CAPITAL PROJECT DELIVERY OFFICE</b>			
Capital Project Delivery (44)	4.00	6.00	2.00
<b>STRATEGIC ALIGNMENT</b>			
Strategic Alignment (39)	-	3.00	3.00
<b>SAFETY AND SECURITY OFFICE</b>			
Safety and Security (15)	12.00	12.00	-
<b>TRANSPORTATION OFFICE</b>			
Operations - Fixed Route (11,12)	178.00	176.00	(2.00)
Operations - Paratransit (13, 14)	59.00	59.00	-
Customer Service (45)	6.00	5.00	(1.00)
<b>PLANNING OFFICE</b>			
Planning (49)	8.00	11.00	3.00
<b>FINANCE OFFICE</b>			
Finance (41)	22.00	22.00	-
Information Technology (42)	2.00	2.00	-
<b>MAINTENANCE OFFICE</b>			
Maintenance (21, 22)	53.00	59.00	6.00
SunFuels (10)	3.00	3.00	-
Facilities Maintenance (23, 24)	8.00	7.00	(1.00)
Stops & Zones (25)	8.00	8.00	-
<b>Total FTEs</b>	<b>381.00</b>	<b>388.00</b>	<b>7.00</b>

**REVENUE SUMMARY**



Sources of Funding (Operating)	FY25 Approved Budget	FY25 Estimates	FY25 Variance	FY26 Proposed Budget	FY26 Variance	Type
Emission Credit Revenue	1,840,663	1,061,346	(779,317)	-	(1,840,663)	Local
Other Local Revenue	-	376,342	376,342	3,040,663	3,040,663	Local
ARPA FTA Section 5307	120,000	98,500	(21,500)	-	(120,000)	Federal
CMAQ	380,000	939,274	559,274	-	(380,000)	Federal
California Energy Commission	100,000	100,000	-	369,000	269,000	State
Haul Pass & Commuterlink	181,000	181,000	-	181,000	-	Local
Farebox - Fixed Route	1,491,935	1,454,140	(37,795)	1,585,591	93,656	Sales
Farebox - Paratransit	299,958	184,703	(115,255)	206,302	(93,656)	Sales
SunRide Revenue	25,000	78,260	53,260	25,000	-	Sales
FTA Section 5307	4,285,218	4,285,218	-	5,161,120	875,902	Federal
California Air Resource Board	200,000	177,333	(22,667)	-	(200,000)	State
FTA Section 5311	429,768	556,618	126,850	439,003	9,235	Federal
FTA Section 5311(f)	300,000	400,000	100,000	300,000	-	Federal
Local Transportation Funds (LTF)	28,829,900	28,829,900	-	31,721,487	2,891,587	State
Low-Carbon Transit Operations Program	1,458,436	1,458,436	-	433,334	(1,025,102)	State
Measure A	8,238,000	8,238,000	-	7,000,000	(1,238,000)	Local
SunFuels - Outside Sales	1,200,000	985,193	(214,807)	-	(1,200,000)	Sales
Taxi Voucher (Passenger Sales)	37,500	13,115	(24,385)	37,500	-	Sales
<b>Total Operating Revenue</b>	<b>49,417,378</b>	<b>49,417,378</b>	<b>\$ -</b>	<b>50,500,000</b>	<b>1,082,622</b>	

**Notes:**

- The FY25 variance reflects the difference between FY25 estimates and FY25 approved budget. The FY26 variance indicates the difference between FY26 proposed budget and FY25 approved budget.

## **REVENUE & FUNDING SOURCES**

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In addition to passenger and other revenues, the Agency receives a mix of funding from federal, state, and local funding sources. These are utilized to fund the operation of nine (9) routes, connecting the Coachella Valley from Desert Hot Springs and Palm Springs in the northwest to Mecca, Oasis, and North Shore in the east and one (1) regional Commuter route operating between Indio and San Bernardino. The Agency's service includes complementary paratransit service to locations within 3/4 miles of the local fixed route network. An overview of each funding source is outlined below.

### **HAUL PASS**

In August 2018, SunLine launched its Haul Pass Program to improve student access to Coachella Valley's colleges and university. Both the College of the Desert (COD) and the California State University, San Bernardino (CSUSB) Palm Desert Campus are partners. COD and CSUSB underwrite the cost of the passes for their students. In FY22 SunLine expanded the program to include high school students. The Haul Pass program for high school students is funded through a grant from the Low Carbon Transit Operations Program (LCTOP).

### **EMISSIONS CREDITS (SALES OF FUEL CREDITS)**

Included within AB 32 is the Low Carbon Fuel Standards (LCFS) program which regulates the carbon content of transportation fuels through the designation of regulated parties for various types of fuels. CNG is considered a low carbon fuel and is exempt from all LCFS regulation unless the Regulated Party wishes to earn and trade their LCFS credits. Under California Air Resources Board (CARB) regulations, the Agency, as the owner of the CNG fueling stations, can earn LCFS credits for CNG Therm usage. Those credits may then be sold to other entities that have difficulty attaining the legislated standards for their carbon cap limits. These entities will be able to purchase carbon credits to offset their carbon deficits.

### **FAREBOX**

Farebox revenues are generated from the collection of passenger fares and ticket sales. This revenue is projected based on historical data and planned service levels.

### **FTA SECTION 5307**

Section 5307 is a Federal Urbanized Area Formula Fund authorized under MAP 21 legislation which apportions federal funding on factors such as urbanized area population and ridership.

### **CALIFORNIA ENERGY COMMISSION AND CALIFORNIA AIR RESOURCES BOARD**

The California Energy Commission (CEC) and California Air Resources Board (CARB) are two State agencies that focus on reducing green house gas emissions. Funding for FY26 will be utilized as a pass through expense to the California Transit Training Consortium for curriculum development.

## **REVENUE & FUNDING SOURCES**

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### **FTA SECTION 5311/5311(f)**

Section 5311 is a Federal Rural Area Formula Fund authorized under MAP 21 legislation which apportions federal funding in support of transportation services in rural areas (< 50,000 population). Section 5311(f) is funding allocated for intercity bus operations.

### **LOCAL TRANSPORTATION FUND (LTF)**

This funding is derived from a 1/4 cent of the general sales tax collected statewide.

### **LOW-CARBON TRANSIT OPERATIONS PROGRAM (LCTOP)**

LCTOP funding was created from the Transit, Affordable Housing, and Sustainable Communities Program in 2014. The program provides operating and capital assistance for transit agencies to reduce greenhouse gas emissions and improve mobility with a priority on disadvantaged communities.

### **MEASURE A**

Measure A is local funding for specialized transportation projects approved by voters in 1988. This funding is a half-cent sales tax for Riverside County and was re-approved by voters in 2002. This funding will continue until 2039.

### **SUNFUELS**

SunFuels revenue is generated by the sale of CNG to outside users in the Coachella Valley. The Agency makes a profit on the production of such fuels.

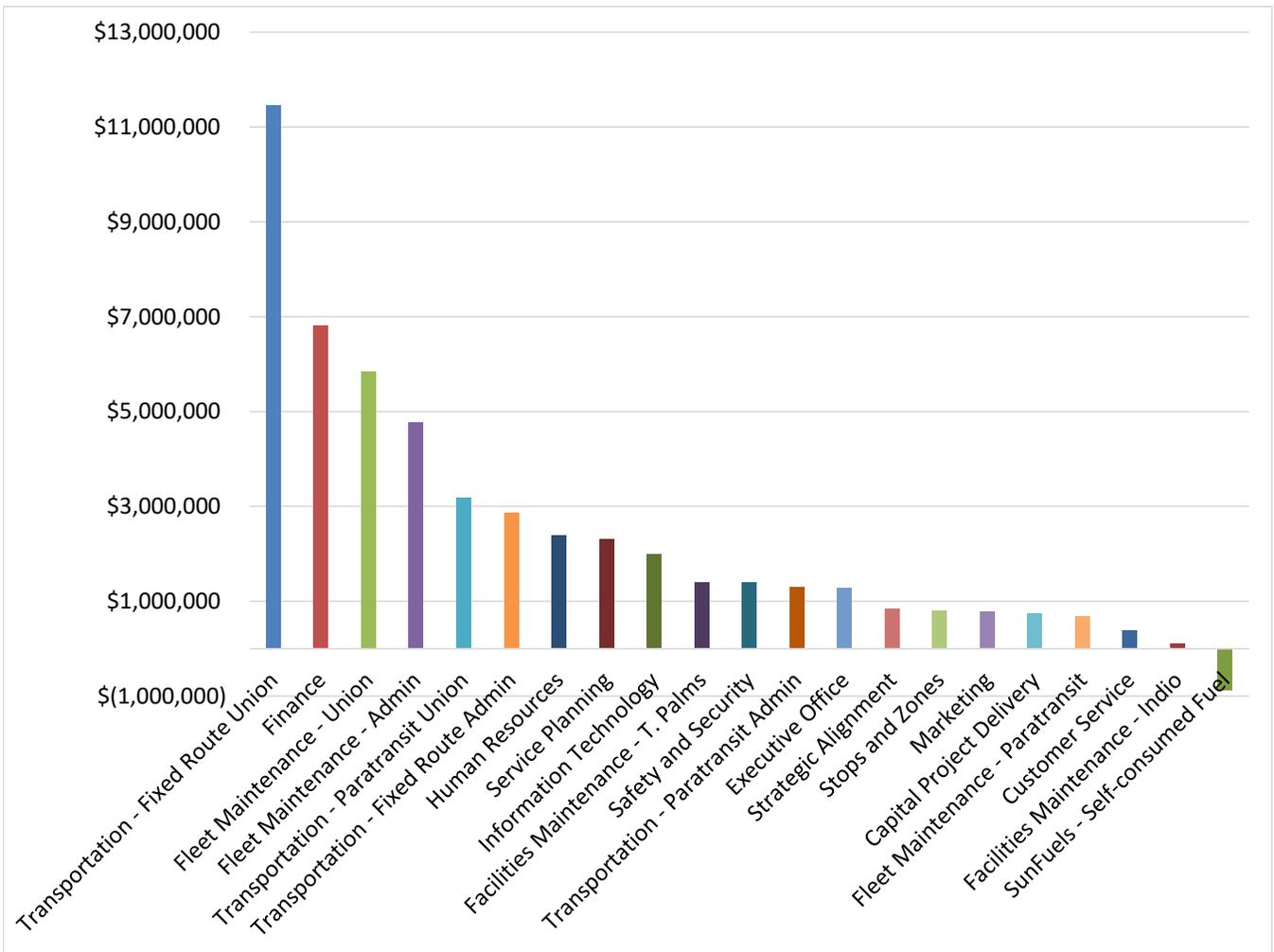
### **OTHER LOCAL REVENUE**

Other local revenue includes revenues generated by the Agency such as advertising revenues and insurance recoveries.

### **TAXI VOUCHER PROGRAM (Passenger Sales)**

This revenue is generated from customers purchasing taxi vouchers from SunLine as part of our Taxi Voucher Program. The customer receives a match from SunLine for the amount paid (\$1 for \$1). Customers are limited to a programmed limit per month and can reload their cards during a specific time frame.

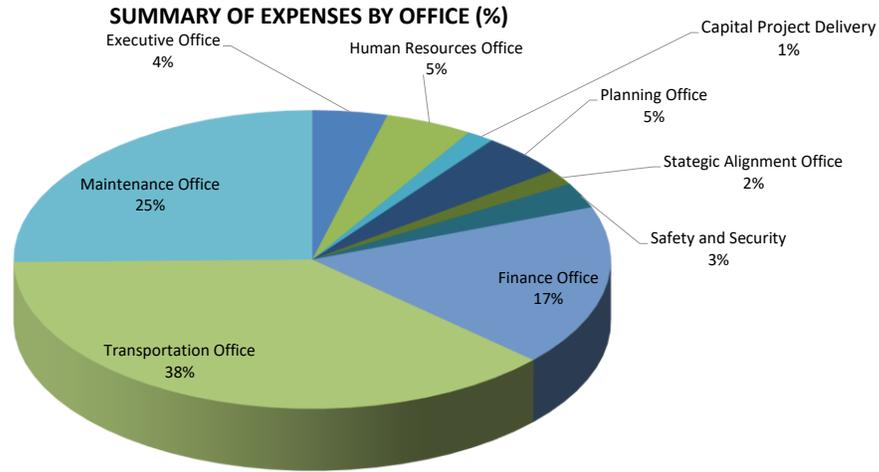
## EXPENSE SUMMARY



**EXPENSE SUMMARY**

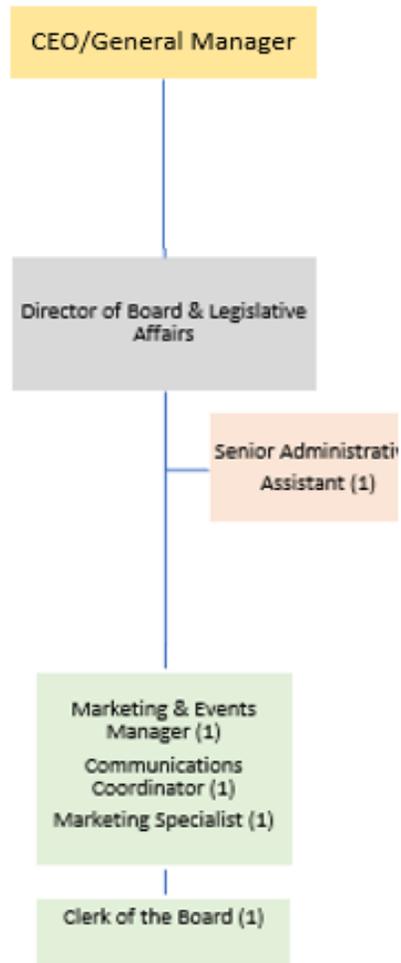
Division	Division Name	FY25 Approved Budget	FY26 Proposed Budget	Variance
<b>EXECUTIVE OFFICE</b>				
40	Executive Office	946,981	1,270,645	323,665
31	Marketing	2,219,209	776,883	(1,442,326)
<b>HUMAN RESOURCES OFFICE</b>				
32	Human Resources	2,028,830	2,390,626	361,796
<b>STRATEGIC ALIGNMENT</b>				
39	Strategic Alignment	138,400	842,801	704,401
<b>CAPITAL PROJECT DELIVERY OFFICE</b>				
44	Capital Project Delivery	735,509	754,178	18,669
<b>SAFETY AND SECURITY OFFICE</b>				
15	Safety and Security	1,764,513	1,395,357	(369,156)
<b>FINANCE OFFICE</b>				
41	Finance	5,986,704	6,814,216	827,512
42	Information Technology	1,879,094	1,998,413	119,319
<b>TRANSPORTATION OFFICE</b>				
11	Transportation - Fixed Route Admin	2,817,622	2,865,244	47,622
12	Transportation - Fixed Route Union	11,167,500	11,450,911	283,411
13	Transportation - Paratransit Admin	1,024,557	1,299,927	275,370
14	Transportation - Paratransit Union	2,890,155	3,186,856	296,701
45	Customer Service	487,878	381,810	(106,068)
<b>PLANNING OFFICE</b>				
49	Service Planning	1,008,073	2,316,597	1,308,524
<b>MAINTENANCE OFFICE</b>				
10	SunFuels	254,919	(867,139)	(1,122,058)
13	Fleet Maintenance - Paratransit	670,551	683,500	12,949
21	Fleet Maintenance - Admin	5,061,199	4,766,723	(294,476)
22	Fleet Maintenance - Union	5,906,781	5,836,077	(70,704)
23	Facilities Maintenance - T. Palms	1,529,971	1,407,866	(122,105)
24	Facilities Maintenance - Indio	123,250	115,250	(8,000)
25	Stops and Zones	775,683	813,260	37,577
<b>Total</b>		<b>49,417,378</b>	<b>50,500,000</b>	<b>1,082,623</b>

**EXPENSE SUMMARY BY OFFICE**



Office	FY25 Approved Budget	FY26 Proposed Budget	% of Budget
<b>EXECUTIVE OFFICE</b>			
Executive Office	946,981	1,270,645	3%
Marketing	2,219,209	776,883	2%
<b>Executive Office</b>	<b>3,166,190</b>	<b>2,047,528</b>	<b>4%</b>
<b>HUMAN RESOURCES OFFICE</b>			
Human Resources	2,028,830	2,390,626	5%
<b>Human Resources Office</b>	<b>2,028,830</b>	<b>2,390,626</b>	<b>5%</b>
<b>STRATEGIC ALIGNMENT OFFICE</b>			
Strategic Alignment	138,400	842,801	2%
<b>Strategic Alignment Office</b>	<b>138,400</b>	<b>842,801</b>	<b>2%</b>
<b>CAPITAL PROJECT DELIVERY OFFICE</b>			
Capital Project Delivery	735,509	754,178	1%
<b>Capital Project Delivery Office</b>	<b>735,509</b>	<b>754,178</b>	<b>1%</b>
<b>SAFETY AND SECURITY OFFICE</b>			
Safety and Security	1,764,513	1,395,357	3%
<b>Safety and Security Office</b>	<b>1,764,513</b>	<b>1,395,357</b>	<b>3%</b>
<b>FINANCE OFFICE</b>			
Finance	5,986,704	6,814,216	13%
Information Technology	1,879,094	1,998,413	4%
<b>Finance Office</b>	<b>7,865,798</b>	<b>8,812,629</b>	<b>17%</b>
<b>PLANNING OFFICE</b>			
Service Planning	1,008,073	2,316,597	5%
<b>Planning Office</b>	<b>1,008,073</b>	<b>2,316,597</b>	<b>5%</b>
<b>TRANSPORTATION OFFICE</b>			
Transportation - Fixed Route Admin	2,817,622	2,865,244	6%
Transportation - Fixed Route Operators	11,167,500	11,450,911	23%
Transportation - Paratransit Admin	1,024,557	1,299,927	3%
Transportation - Paratransit Operators	2,890,155	3,186,856	6%
Customer Service	487,878	381,810	1%
<b>Transportation Office</b>	<b>18,387,712</b>	<b>19,184,748</b>	<b>38%</b>
<b>MAINTENANCE OFFICE</b>			
SunFuels	254,919	(867,139)	-2%
Fleet Maintenance - Paratransit	670,551	683,500	1%
Fleet Maintenance - Admin	5,061,199	4,766,723	9%
Fleet Maintenance - Mechanics	5,906,781	5,836,077	12%
Facilities Maintenance - T. Palms	1,529,971	1,407,866	3%
Facilities Maintenance - Indio	123,250	115,250	0.2%
Stops & Zones	775,683	813,260	2%
<b>Maintenance Office</b>	<b>14,322,354</b>	<b>12,755,537</b>	<b>25%</b>
<b>Total Expenses</b>	<b>49,417,378</b>	<b>50,500,000</b>	<b>100%</b>

# EXECUTIVE OFFICE



**EXECUTIVE OFFICE**

**Division 40**

**FUNCTIONS & RESPONSIBILITIES**

The Executive Office is responsible for the overall administration and operation of the Agency. The Executive Office provides support to the Agency Board of Directors and maintains all records of the Agency's business.

**EXPENSE BUDGET SUMMARY - EXECUTIVE OFFICE (DIV 40)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimated Actuals	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	670,067	589,418	427,774	389,698	492,889	103,191
5010201610 ADMIN SALARIES-OT	919	548	216	-	1,500	1,500
5010700000 ALLOCATED SALARIES	(5,081)	(4,483)	(3,242)	(6,217)	(4,205)	2,012
5029999999 TOTAL FRINGE BENEFITS	308,891	284,488	367,123	256,500	324,042	67,542
5030200000 PUBLIC NOTICES	-	-	-	-	-	-
5030300002 LEGAL SERVICES - LABOR COUNSEL	563,451	551,101	-	-	-	-
5030300005 LEGAL SVCS- GENERAL	82,340	264,350	3,127	-	-	-
5030300006 LEGAL SVCS-SPECIAL	-	125,279	-	-	-	-
5030303250 CONSULTING	-	58,510	130,370	100,000	196,919	96,919
5030303290 ORGANIZATIONAL SERVICES	-	-	-	-	-	-
5049900000 PRINTING ADMINISTRATION	4,723	6,918	1,120	2,500	-	(2,500)
5049900001 OFFICE SUPPLIES-GENERAL	2,138	1,985	713	3,000	3,000	-
5090100000 MEMBERSHIPS & SUBSCRIPTIONS	72,001	90,713	179,081	80,000	150,000	70,000
5090200000 TRAVEL-MEETINGS/SEMINARS	29,336	31,109	42,792	65,000	60,000	(5,000)
5090200001 TRAINING/ WORKSHOP	4,478	7,127	1,107	-	-	-
5090200002 BOARD MEETING EXPENSES	4,085	4,764	10,130	8,500	8,500	-
5090200003 BOARD MEMBER COMPENSATION	7,504	7,175	6,233	18,000	18,000	-
5090200004 EMPLOYEE DEVELOPMENT PROGRAM	23,802	1,209	-	-	-	-
5099900002 MISCELLANEOUS EXPENSE	2,305	22,956	32,133	30,000	20,000	(10,000)
5099900004 CONSULTING-GENERAL	342,468	-	-	-	-	-
<b>Total Expenses</b>	<b>2,113,428</b>	<b>2,043,167</b>	<b>1,198,678</b>	<b>946,981</b>	<b>1,270,645</b>	<b>323,665</b>

**PERSONNEL SUMMARY**

FY26 Proposed FTE's	Classification
1	Chief Executive Officer/General Manager
1	Director of Board & Legislative Affairs
1	Senior Administrative Assistant
<b>3</b>	<b>Total FTE's</b>

**ADMINISTRATION OFFICE - MARKETING**

**Division 31**

**FUNCTIONS & RESPONSIBILITIES**

SunLine's Marketing Department plays a vital role in connecting with the community and promoting the Agency's mission. The Marketing department is dedicated to fostering relationships with the community through events and impactful outreach efforts. This helps build trust and transparency. The department coordinates events, recruits and oversees volunteers, creates press releases, and develops public relation strategies to promote SunLine's mission. The team aims to cultivate strong community connections, create a top-of-mind customer experience, enhance brand visibility, and communicate SunLine's commitment to excellence in public transportation services. Ultimately, the Marketing team strives for SunLine's brand to be the top choice for riders.

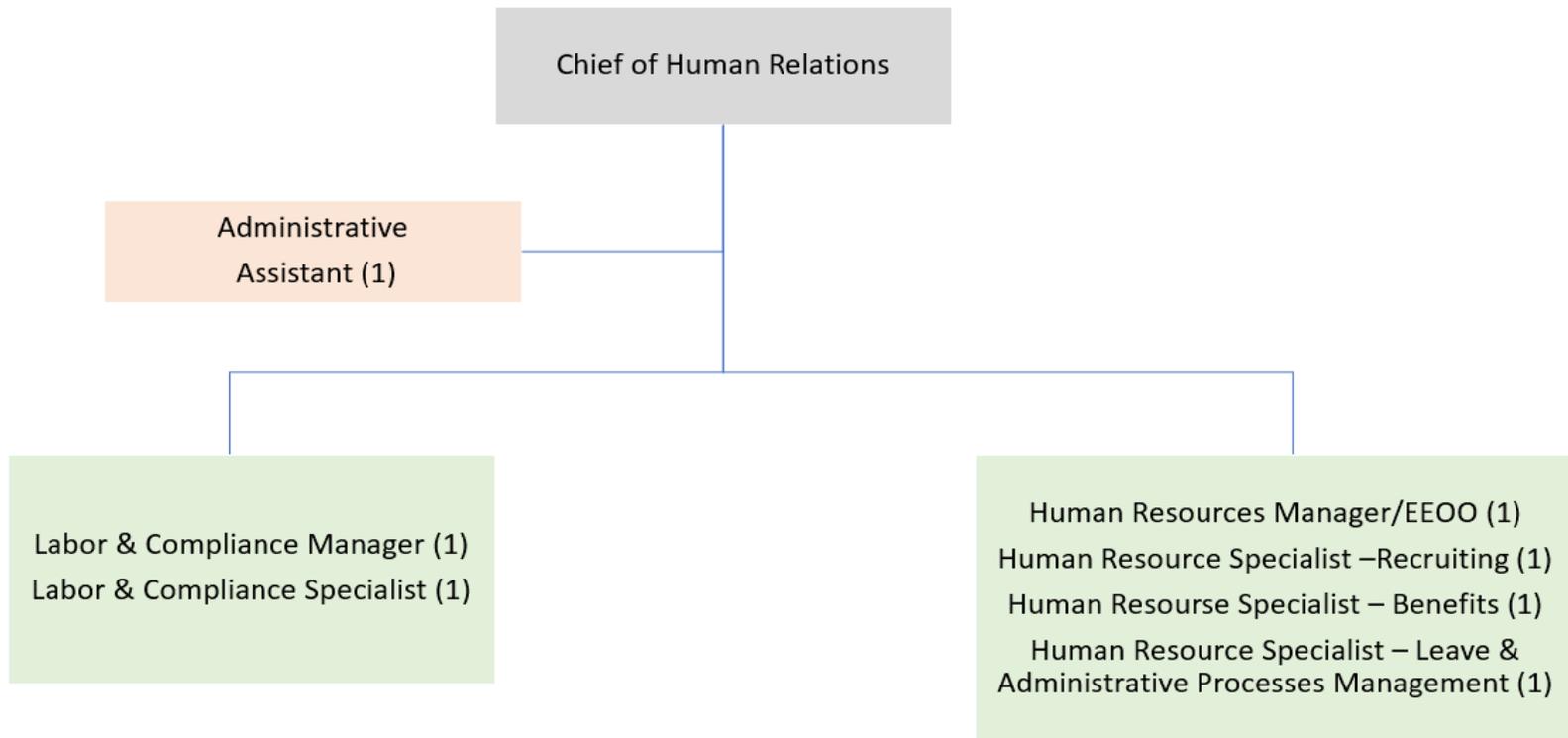
**EXPENSE BUDGET SUMMARY - MARKETING (DIV 31)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	104,562	229,965	242,907	407,490	188,867	(218,623)
5010201610 ADMIN SALARIES-OT	1,964	1,884	1,511	5,000	3,500	(1,500)
5010700000 ALLOCATED SALARIES	-	-	(8,333)	-	-	-
5029999999 TOTAL FRINGE BENEFITS	63,554	206,424	172,406	286,219	158,016	(128,203)
5030303240 CONTRACTED SERVICES	155,233	149,863	152,613	197,879	160,000	(37,879)
5030303260 ADVERTISING	61,564	87,156	123,156	115,500	130,000	14,500
5030303270 SUNLINE EVENTS EXPENSE	16,360	5,588	38,431	30,000	40,000	10,000
5030303273 ANTI-HUMAN TRAFFICKING CAMPAIGN	7,020	-	-	-	-	-
5030400000 TEMPORARY HELP SERVICES	2,046	-	5,674	5,000	2,500	(2,500)
5039900003 PRINTING EXPENSE	23,868	30,060	32,826	55,000	40,000	(15,000)
5039900014 SUNRIDE RIDE SHARE EXPENSES	-	-	1,096,940	1,022,121	-	(1,022,121)
5049900000 TRAINING	-	-	-	5,000	3,000	(2,000)
5049900001 OFFICE SUPPLIES-GENERAL	5,236	2,319	1,934	6,000	5,000	(1,000)
5090100000 MEMBERSHIPS & SUBSCRIPTIONS	1,740	1,728	4,589	4,000	5,500	1,500
5090200000 TRAVEL MEETINGS/SEMINARS	4,888	4,195	12,008	25,000	15,000	(10,000)
5090201000 EMPLOYEE EVENT EXPENSE	-	-	9,957	50,000	25,000	(25,000)
5090201001 EMPLOYEE EVENT EXPENSE	-	-	-	-	500	500
5090800100 EMPLOYEE RECOGNITION	-	-	200	5,000	-	(5,000)
<b>Total Expenses</b>	<b>448,034</b>	<b>719,183</b>	<b>1,886,821</b>	<b>2,219,209</b>	<b>776,883</b>	<b>(1,442,326)</b>

**PERSONNEL SUMMARY**

FY26 Proposed FTE's	Classification
1	Clerk of the Board
1	Marketing & Events Manager
1	Communications Coordinator
1	Marketing Specialist
<b>4</b>	<b>Total FTE's</b>

# HUMAN RESOURCES OFFICE



## Human Resources Office

### Division 32

#### FUNCTIONS & RESPONSIBILITIES

The Human Resources Department is an essential part of the Agency, responsible for managing our most valuable asset: our employees. Our HR team provides support in areas such as recruitment, compensation and benefits, employee relations, performance management, and training and development. With a focus on attracting, developing, and retaining top talent, we strive to create a positive work culture and foster a sense of community within our organization. As we continue to grow and expand, the HR Department plays a critical role in ensuring our employees are engaged, motivated, and have the resources they need to succeed.

#### EXPENSE BUDGET SUMMARY - HUMAN RESOURCES (DIV 32)

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25	FY26	Variance
				Approved Budget	Proposed Budget	
5010200500 ADMIN SALARIES	327,531	469,360	571,510	553,577	534,286	(19,291)
5010201610 ADMIN SALARIES-OT	1,186	1,105	1,499	2,000	2,500	500
5010700000 ALLOCATED SALARIES	(2,490)	(3,556)	(4,341)	(3,557)	(4,250)	(693)
5029999999 TOTAL FRINGE BENEFITS	211,214	316,235	276,721	355,322	330,594	(24,728)
5030300001 BENEFIT MANAGEMENT EXPENSES	24,263	27,634	27,044	25,396	25,396	-
5030300002 LEGAL SERVICES - LABOR COUNSEL	-	-	457,295	487,176	400,000	(87,176)
5030300003 MEDICAL-EXAMS AND TESTING	19,923	18,447	20,183	35,000	28,000	(7,000)
5030300005 LEGAL SVCS- GENERAL	-	-	663,492	100,000	670,000	570,000
5030300006 LEGAL SVCS-SPECIAL	-	-	60,372	100,000	65,000	(35,000)
5030303250 CONSULTING	-	106,875	172,476	200,000	180,000	(20,000)
5030400000 TEMPORARY HELP SERVICES	-	-	93,872	5,000	5,000	-
5039900003 PRINTING EXPENSE	2,560	1,154	1,277	2,500	2,500	-
5049900000 HR TRAINING	687	834	2,744	1,500	2,000	500
5049900001 OFFICE SUPPLIES	2,948	2,621	2,494	4,000	4,000	-
5090100000 MEMBERSHIPS & SUBSCRIPTIONS	5,886	6,835	3,770	9,000	7,000	(2,000)
5090200000 TRAVEL MEETINGS/SEMINARS	426	12,518	19,113	10,000	10,000	-
5090201000 EMPLOYEE EXPENSE	4,112	29,554	36,949	40,000	40,000	-
5090201001 EMPLOYEE WELLNESS PLAN EXPENSE	1,562	1,501	1,766	3,000	3,000	-
5090800000 RECRUITING EMPLOYEES	39,842	15,414	15,722	50,000	60,000	10,000
5090800100 EMPLOYEE RECOGNITION	422	266	8,941	10,600	10,600	-
5090800125 TUITION REIMBURSEMENT	8,367	14,380	6,672	20,000	15,000	(5,000)
5099900001 STAFF DEVELOPMENT	-	-	22,555	18,315	-	(18,315)
<b>Total Expenses</b>	<b>648,436</b>	<b>1,021,176</b>	<b>2,462,125</b>	<b>2,028,830</b>	<b>2,390,626</b>	<b>361,796</b>

#### PERSONNEL SUMMARY

FY26 Proposed FTE's	Classification
1	Chief of Human Relations
1	Administrative Assistant
1	Human Resources Specialist - Recruiting
1	Labor & Compliance Manager
1	Labor & Compliance Specialist
1	Human Resources Specialist - Benefits
1	Human Resources Specialist - Leave & Administrative Processes Management
1	Human Resources Manager/EEOO
<b>8</b>	<b>Total FTE's</b>

# STRATEGIC ALIGNMENT OFFICE

Chief of Strategic Alignment

Staff Development Coordinator (1)  
Operations Design Analyst (1)

**STRATEGIC ALIGNMENT OFFICE**

Division 39

**FUNCTIONS & RESPONSIBILITIES**

SunLine Transit Agency is establishing a Strategic Alignment Department to unify internal policies, ensure consistent documentation, and align operations with agency-wide goals. This department will lead the completion and integration of SunLine’s Vision and Mission Statement, ensuring they are reflected in all strategic efforts.

In addition, the department will develop and oversee training and mentorship programs that support employee growth and strengthen organizational cohesion. By streamlining policies and fostering workforce development, the department will help drive agency-wide alignment, efficiency, and long-term success.

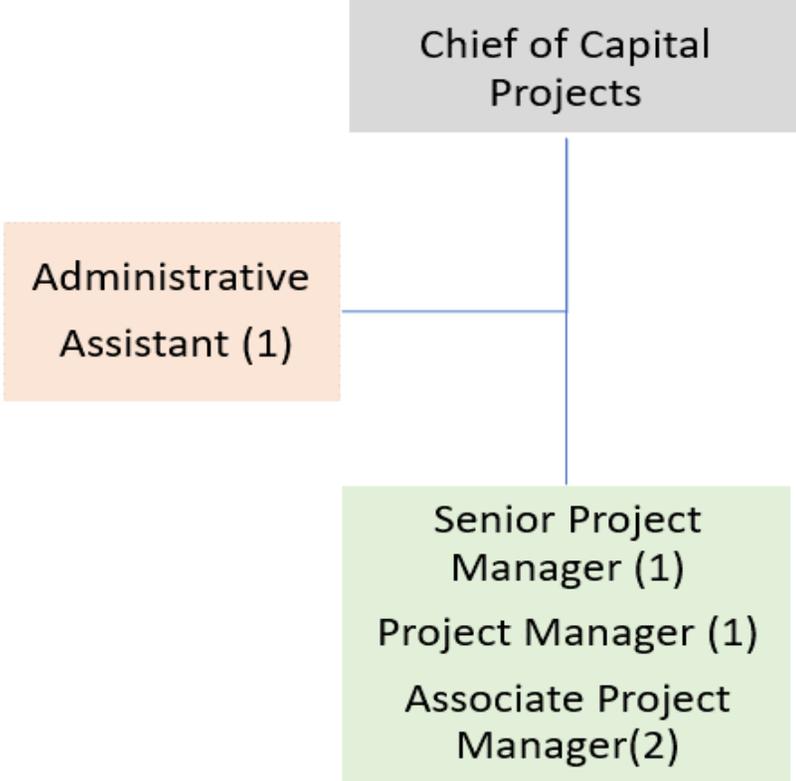
**EXPENSE BUDGET SUMMARY - STRATEGIC ALIGNMENT**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	-	-	44,319	-	194,880	194,880
5010201610 ADMIN SALARIES-OT	-	-	110	-	1,500	1,500
5029999999 TOTAL FRINGE BENEFITS	-	-	85,268	-	141,076	141,076
5030303250 CONSULTING	-	-	-	12,500	10,000	(2,500)
5039900003 PRINTING EXPENSE	-	-	-	-	2,500	2,500
5039900016 WORKFORCE TRAINING - CEC	-	-	-	100,000	365,000	265,000
5049900001 OFFICE SUPPLIES-GENERAL	-	-	-	1,000	1,500	500
5090100000 MEMBERSHIPS & SUBSCRIPTIONS	-	-	-	-	5,000	5,000
5090200000 TRAVEL-MEETINGS/SEMINARS	-	-	360	2,000	10,000	8,000
5090200000 TRAVEL-MEETINGS/SEMINARS - CTW	-	-	-	-	57,345	57,345
5090201000 EMPLOYEE EXPENSES	-	-	-	-	2,000	2,000
5090800100 EMPLOYEE RECOGNITION	-	-	95	-	2,000	2,000
5099900001 STAFF DEVELOPMENT	-	-	-	22,900	50,000	27,100
<b>Total Expenses</b>	-	-	<b>130,151</b>	<b>138,400</b>	<b>842,801</b>	<b>704,401</b>

**PERSONNEL SUMMARY**

FY26 Proposed FTE's	Classification
1	Chief of Strategic Alignment
1	Staff Development Coordinator
1	Operations Design Analyst
<b>3</b>	<b>Total FTEs</b>

# CAPITAL PROJECT DELIVERY OFFICE



**CAPITAL PROJECT DELIVERY OFFICE**

Division 44

**FUNCTIONS & RESPONSIBILITIES**

The Capital Project Delivery Office is responsible for supporting SunLine's daily operations by managing and delivering significant capital projects.

**EXPENSE BUDGET SUMMARY - CAPITAL PROJECT DELIVERY (DIV 44)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	475,585	241,779	391,260	315,683	451,017	135,334
5010201610 ADMIN SALARIES-OT	199	45	675	-	1,800	1,800
5010700000 ALLOCATED SALARIES	(3,607)	(1,723)	(2,969)	-	(3,980)	(3,980)
5010700001 GRANT ALLOCATION	-	-	-	-	(20,000)	(20,000)
5029999999 TOTAL FRINGE BENEFITS	258,240	216,121	240,966	171,026	307,941	136,915
5030300009 CONTRACTED SERVICES	-	-	957	-	-	-
5030303250 CONSULTING	-	60,614	-	20,000	-	(20,000)
5039900013 CENTER OF EXCELLENCE - CARB	25,324	41,464	54,833	-	-	-
5039900015 CLEAN CITIES COALITION	8,122	-	-	-	-	-
5039900016 CENTER OF EXCELLENCE - CEC	-	1,232	-	200,000	-	(200,000)
5049900000 PRINTING ADMINISTRATION	324	-	-	400	400	-
5049900001 OFFICE SUPPLIES-GENERAL	713	735	1,710	1,500	2,000	500
5090100000 MEMBERSHIPS & SUBSCRIPTIONS	1,613	1,610	1,344	4,000	3,000	(1,000)
5090200000 TRAVEL-MEETINGS/SEMINARS	7,213	5,708	5,169	15,000	12,000	(3,000)
5090200001 TRAINING/ WORKSHOP	-	6,602	-	7,200	-	(7,200)
5090200004 EMPLOYEE DEVELOPMENT PROGRAM	19,683	17,952	1,145	-	-	-
5090201000 EMPLOYEE EXPENSES	384	107	-	700	-	(700)
5099900004 CONSULTING-GENERAL	340,447	-	-	-	-	-
<b>Total Expenses</b>	<b>1,134,242</b>	<b>592,245</b>	<b>695,091</b>	<b>735,509</b>	<b>754,178</b>	<b>18,669</b>

**PERSONNEL SUMMARY**

FY26 Proposed FTE's	Classification
1	Chief of Capital Projects
1	Administrative Assistant
1	Senior Project Manager
1	Project Manager
2	Associate Project Manager
<b>6</b>	<b>Total FTEs</b>

# SAFETY AND SECURITY OFFICE



## SAFETY AND SECURITY OFFICE

### Division 15

#### FUNCTIONS & RESPONSIBILITIES

The mission of the Safety Department is to maintain a positive safety culture in the organization. To achieve this, they put systems in place to identify, address, and resolve safety concerns across the system. The department also consult with other departments and contractors to minimize human and economic losses to the public, employees, and SunLine Transit Agency. Additionally, the department aims to identify hazardous conditions and reduce potential injuries, accidents, and property damage, while ensuring the safety of employees, customers, facilities, and equipment.

The staff reviews policies and procedures, monitors the operation of all services, and takes a proactive role in identifying measures to address hazards. They investigate all accidents and injuries and make recommendations for preventive measures based on identified trends. The Safety department leads the organization-wide efforts to implement safety management systems (SMS).

Furthermore, the department is responsible for ensuring the safety, protection, and integrity of the transportation system. They continually collaborate with law enforcement and other regional first responders to ensure effective planning for and response to emergencies. The Safety department also maintains the access control and video components for the system.

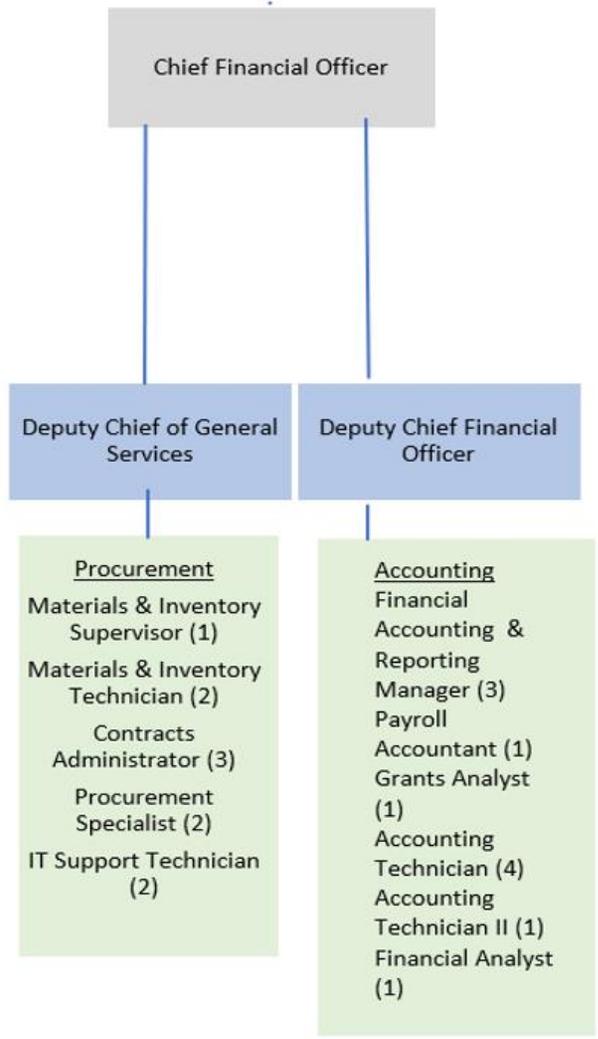
#### EXPENSE BUDGET SUMMARY - Safety and Security (DIV 15)

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	647,309	688,441	526,241	757,594	599,260	(158,334)
5010201510 BARGAINING SALARIES-OT	-	1,455	1,256	1,500	2,987	1,487
5010201610 STAFF OT	4,292	5,393	4,840	9,200	6,257	(2,943)
5010700000 ALLOCATED SALARIES	-	6,930	18,840	-	-	-
5029999999 TOTAL FRINGE BENEFITS	463,472	472,544	327,740	504,919	407,353	(97,566)
5030300001 ID BADGE SUPPLIES	3,484	3,301	3,437	6,000	4,500	(1,500)
5030300003 MEDICAL-EXAMS AND TESTING	33,175	32,214	46,263	32,000	50,000	18,000
5030300010 CONTRACTED SERVICES	-	1,900	18,752	15,000	25,000	10,000
5030300013 UNIFORMS	239	1,265	343	-	1,500	1,500
5030300050 EMPLOYEE INCENTIVE SERVICES	9,650	6,450	1,404	20,000	15,000	(5,000)
5030303250 CONSULTING	-	-	-	15,000	5,000	(10,000)
5030700000 SECURITY SERVICES	324,599	359,683	146,453	168,000	150,000	(18,000)
5030700005 CAMERA MAINTENANCE AGREEMENT	1,152	-	-	-	-	-
5039900012 VANPOOL EXPENSES	186,899	58,202	-	-	-	-
5039900014 SUNRIDE RIDE SHARE EXPENSES	717,449	914,557	13,663	-	-	-
5049900001 OFFICE SUPPLIES	2,687	2,944	435	3,000	1,500	(1,500)
5049900009 MATERIALS & SUPPLIES	14,213	15,808	22,702	20,000	30,000	10,000
5049900010 TRAINING SUPPLIES	154	4,102	1,999	10,000	5,000	(5,000)
5049901000 EMERGENCY PREPARDNESS SUPPLIES	19,996	21,589	25,302	35,000	40,000	5,000
5060300100 REPAIR CLAIMS	176,332	68,045	(800)	100,000	15,000	(85,000)
5090100000 MEMBERSHIPS & SUBSCRIPTIONS	594	1,623	-	5,300	2,500	(2,800)
5090200000 TRAVEL MEETINGS/SEMINARS	18,063	23,473	26,940	52,000	27,000	(25,000)
5090201000 EMPLOYEE EXPENSES	3,153	21,179	-	-	-	-
5090800000 RECRUITING EMPLOYEES	7,275	5,830	6,712	10,000	7,000	(3,000)
5099900002 MISCELLANEOUS EXPENSE	483	284	383	-	500	500
<b>Total Expenses</b>	<b>2,634,668</b>	<b>2,717,212</b>	<b>1,192,906</b>	<b>1,764,513</b>	<b>1,395,357</b>	<b>(369,156)</b>

#### PERSONNEL SUMMARY

FY26 Proposed FTE's	Classification
1	Chief Safety Officer
1	Superintendent of Safety & Training
1	Safety Manager
1	Safety Compliance Specialist
1	Senior Training Supervisor
1	Risk Manager
3	Safety Officer
3	Transit Trainer
<b>12</b>	<b>Total FTEs</b>

# FINANCE OFFICE



**FINANCE OFFICE**

**Division 41**

**FUNCTIONS & RESPONSIBILITIES**

The Finance department is responsible for the budget, grant administration, accounting, sales, contracts/procurement, materials management and inventory control, cash management, investment portfolio and payroll for the Agency. The Finance department is also responsible for the development of all financial statements, coordination of financial audits and development of documents and specialized reports for SunFuels.

**EXPENSE BUDGET SUMMARY - FINANCE (DIV 41)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	785,063	923,365	1,028,427	1,200,000	1,144,813	(55,187)
5010201500 BARGAINING SALARIES	-	10,414	76,073	-	85,650	85,650
5010201610 ADMIN SALARIES-OT	6,643	9,599	35,658	10,000	35,650	25,650
5010700000 ALLOCATED SALARIES	(5,998)	(7,202)	(8,638)	(8,204)	(9,890)	(1,687)
5010700001 GRANT ALLOCATED SALARIES	-	-	-	-	(20,000)	(20,000)
5029999999 TOTAL FRINGE BENEFITS	528,723	645,048	708,639	730,615	831,445	100,830
5030200000 PUBLIC NOTICES	5,119	7,219	7,446	10,000	9,000	(1,000)
5030300009 CONTRACTED SERVICES	5,029	4,392	37,613	173,000	121,133	(51,867)
5030300010 ORGANIZATIONAL SERVICES	(2,025)	-	-	-	-	-
5030300015 AUDIT SERVICES	51,200	78,000	113,333	87,000	80,000	(7,000)
5030303240 MANAGEMENT CONSULTING	54,000	-	-	-	-	-
5030303250 CONSULTING	-	62,660	35,290	15,000	30,000	15,000
5030400000 TEMPORARY HELP SERVICES	282,783	47,223	171,065	-	-	-
5039900004 TAXI VOUCHER - NEW FREEDOM PROGRAM	72,729	56,019	40,893	69,000	41,000	(28,000)
5049900001 OFFICE SUPPLIES	11,757	11,909	18,021	12,500	20,000	7,500
5060100000 INSURANCE - AUTO PHYSICAL DAMAGE	267,773	306,802	301,254	323,000	303,000	(20,000)
5060100100 INSURANCE PREMIUM - PROPERTY	135,417	195,553	232,868	200,000	235,000	35,000
5060300000 INSURANCE - GENERAL LIABILITY	1,297,314	1,759,350	2,030,570	1,610,540	2,000,000	389,460
5060400000 INSURANCE LOSSES	2,305,122	1,569,176	1,078,121	750,000	628,415	(121,585)
5060401000 INSURANCE PREMIUM - WC	616,105	437,429	1,184,580	485,000	950,000	465,000
5060800000 INSURANCE - ADMIN	197,085	193,591	201,502	210,000	202,000	(8,000)
5079900000 PROPERTY & OTHER TAXES	87	460	-	500	500	-
5090100000 MEMBERSHIPS & SUBSCRIPTIONS	538	818	738	1,000	1,500	500
5090200000 TRAVEL MEETINGS/SEMINARS	4,344	11,925	15,791	15,000	15,000	-
5090200002 MILEAGE REIMBURSEMENT	-	327	-	500	500	-
5090201000 EMPLOYEE EXPENSES	1,432	1,899	2,628	3,000	3,000	-
5090801000 BANK SERVICE FEES	21,161	35,723	41,624	38,452	45,000	6,548
5090801030 PR PENALTY/INTEREST EXPENSE	-	-	-	1,000	1,000	-
5090801040 PASS OUTLET COMMISSION	6,644	3,232	3,813	7,300	5,000	(2,300)
5090801050 MOBILE TICKETING COMMISSION	18,888	56,407	52,265	40,000	53,000	13,000
5090801060 BAD DEBT EXPENSE	1,617	13,980	-	2,500	2,500	-
5110101050 INTEREST EXPENSE	14,209	107,527	-	-	-	-
<b>Total Expenses</b>	<b>6,682,757</b>	<b>6,542,843</b>	<b>7,409,576</b>	<b>5,986,704</b>	<b>6,814,216</b>	<b>827,512</b>

**FINANCE OFFICE**

**Division 41**

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**PERSONNEL SUMMARY**

FY26 Proposed FTE's	Classification
1	Chief Financial Officer
1	Deputy Chief Financial Officer
1	Deputy Chief of General Services
3	Accounting and Financial Reporting Manager
4	Accounting Technician
1	Accounting Technician II
1	Payroll Accountant
1	Grants Analyst
1	Financial Analyst
1	Materials & Inventory Supervisor
2	Materials & Inventory Technician
3	Contracts Administrator
2	Procurement Specialist
<b>22</b>	<b>Total FTEs</b>

**FINANCE OFFICE - INFORMATION TECHNOLOGY**

**Division 42**

**FUNCTIONS & RESPONSIBILITIES**

The Information Technology (IT) department is responsible for the management of the network, computer systems and electronic data. IT provides support for users and applications, communication systems and facilitates user training for various systems. Additionally, IT interfaces with vendors for application improvements and issue resolution. IT is also responsible for data integrity management and planning for the future needs of the Agency.

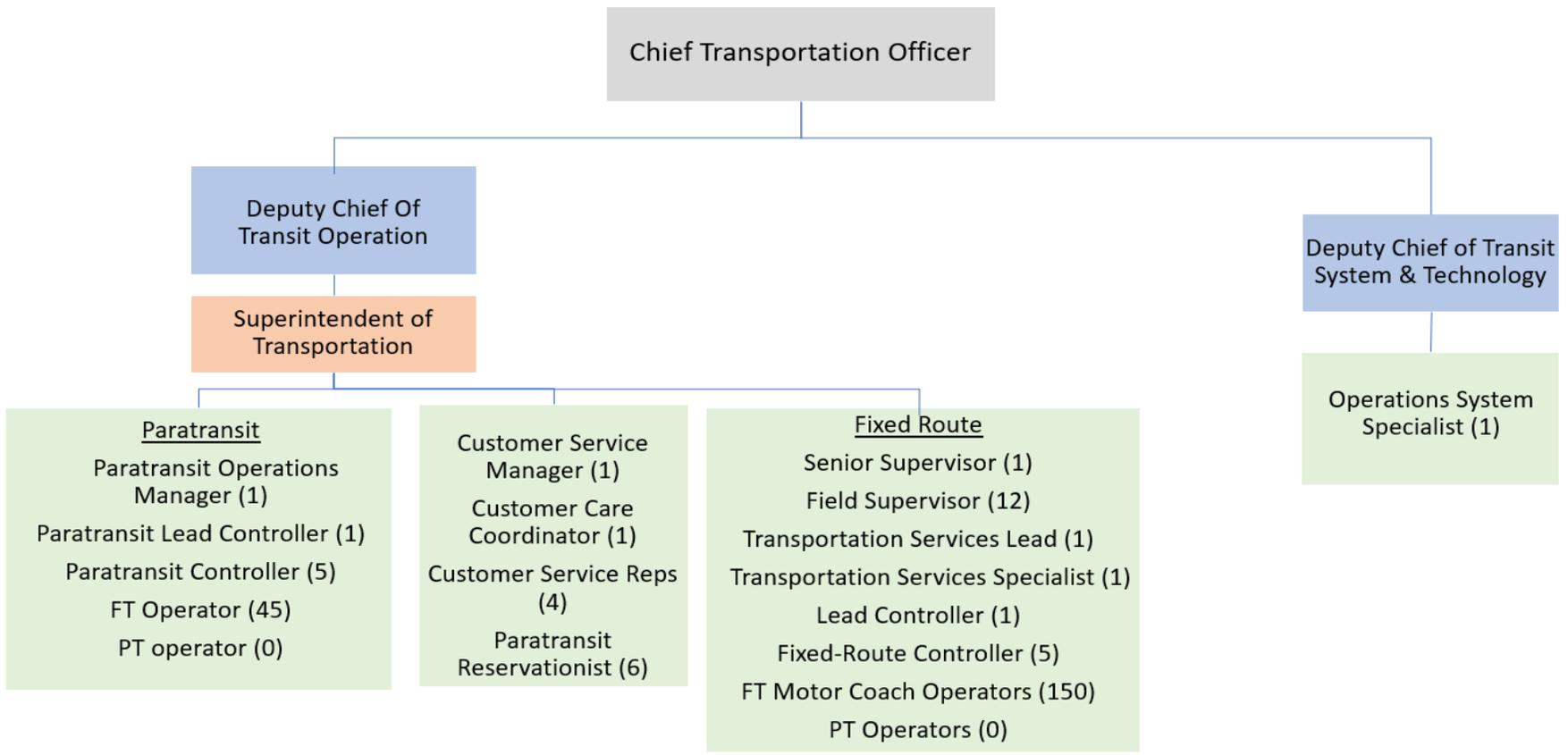
**EXPENSE BUDGET SUMMARY - INFORMATION TECHNOLOGY (DIV 42)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	93,053	55,114	106,096	107,652	115,650	7,998
5010201610 ADMIN SALARIES-OT	266	1,717	13,144	2,200	19,980	17,780
5010700000 ALLOCATED SALARIES	(707)	(437)	(903)	(2,200)	(1,980)	220
5029999999 TOTAL FRINGE BENEFITS	59,794	42,483	60,161	74,278	80,344	6,066
5030200006 COMMUNICATIONS	247,851	276,768	306,173	287,782	295,000	7,218
5030300009 CONTRACTED SERVICES	25,341	44,247	273,861	250,000	394,419	144,419
5030300011 COMPUTER/NETWORK SOFTWARE AGMT	755,825	764,493	1,080,123	1,096,582	1,000,000	(96,582)
5030400000 TEMPORARY HELP SERVICES	10,980	2,974	195	-	-	-
5030500000 OFFICE EQUIPMENT MAINTENANCE	34,144	28,425	31,808	29,000	33,000	4,000
5049900001 OFFICE SUPPLIES	6,715	8,728	6,153	7,800	7,000	(800)
5049900010 COMPUTER SUPPLIES	20,453	24,287	50,055	21,000	50,000	29,000
5090200000 TRAVEL MEETINGS/SEMINARS	29	299	-	5,000	5,000	-
<b>Total Expenses</b>	<b>1,253,743</b>	<b>1,249,099</b>	<b>1,926,865</b>	<b>1,879,094</b>	<b>1,998,413</b>	<b>119,319</b>

**PERSONNEL SUMMARY**

FY26 Proposed FTE's	Classification
2	IT Support Technician
<b>2</b>	<b>Total FTEs</b>

# TRANSPORTATION OFFICE



**TRANSPORTATION OFFICE**

**Division 11, 12, 13 (Ops Only Portion), 14**

**FUNCTIONS & RESPONSIBILITIES**

The Transportation Office plays a pivotal role in managing the daily transit services crucial for addressing the evolving mobility demands of the Coachella Valley. This encompasses overseeing the SunBus Fixed Route and SunDial Paratransit services. The SunLine's fixed route network is extensive, encompassing nine local routes spanning the Coachella Valley. Moreover, SunLine offers commuter express services that extend beyond its service area, facilitating connections between the Coachella Valley and San Bernardino. This connection facilitates seamless transitions to Metrolink trains and routes served by various regional transit agencies such as the Riverside Transit Agency, Omnitrans, Victor Valley Transit Authority, and Mountain Transit.

For individuals with disabilities who are unable to utilize the fixed-route transit system, ADA Paratransit services offer essential accessibility. Paratransit Reservationists play a vital role in this process, assisting in scheduling rides, catering to special requirements such as mobility devices, accompanying clients, and ensuring the accommodation of service animals.

Furthermore, the Transportation Projects team extends its support beyond routine operations by engaging in transportation and maintenance projects that fall outside the realm of large-scale capital construction. This multifaceted approach underscores the commitment to ensuring comprehensive and efficient transportation services while accommodating diverse needs within the community.

**EXPENSE BUDGET SUMMARY - FIXED ROUTE ADMIN (DIV 11)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	1,127,839	1,350,314	1,333,116	1,581,944	1,388,719	(193,225)
5010201500 CUSTOMER SERVICE SALARIES	-	121,832	250,326	-	261,251	261,251
5010201510 BARGAINING SALARIES-OT	-	5,417	8,166	-	8,346	8,346
5010201610 ADMIN SALARIES-OT	42,067	53,963	52,326	63,172	54,053	(9,119)
5029999999 TOTAL FRINGE BENEFITS	837,728	1,018,189	965,057	1,082,522	1,032,434	(50,088)
5030300013 UNIFORMS	22,840	42,619	42,682	45,224	55,182	9,958
5039900003 PRINTING EXPENSE	2,450	7,381	11,160	9,500	12,000	2,500
5049900001 OFFICE SUPPLIES	1,168	1,478	736	1,260	1,260	-
5049900011 MATERIALS & SUPPLIES	1,273	934	2,170	2,000	3,000	1,000
5090200000 TRAVEL MEETINGS/SEMINARS	2,850	25,107	30,992	19,000	26,000	7,000
5090201000 EMPLOYEE EXPENSE	1,291	1,469	1,533	3,000	3,000	-
5099900004 BUS RODEO EXPENDITURES	-	-	11,988	10,000	20,000	10,000
<b>Total Expenses</b>	<b>2,039,506</b>	<b>2,628,702</b>	<b>2,710,254</b>	<b>2,817,622</b>	<b>2,865,244</b>	<b>47,622</b>

**EXPENSE BUDGET SUMMARY - FIXED ROUTE UNION (DIV 12)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010101010 OPERATOR WAGES - FT	5,536,725	6,429,758	6,250,975	6,844,892	6,967,901	123,009
5010101020 OPERATOR WAGES OVERTIME - FT	898,234	857,190	1,230,530	775,000	900,000	125,000
5029999999 TOTAL FRINGE BENEFITS	3,224,839	3,699,128	3,271,032	3,547,608	3,583,010	35,402
<b>Total Expenses</b>	<b>9,659,799</b>	<b>10,986,077</b>	<b>10,752,537</b>	<b>11,167,500</b>	<b>11,450,911</b>	<b>283,411</b>

**EXPENSE BUDGET SUMMARY - PARATRANSIT ADMIN (DIV 13 OPS ONLY PORTION)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	395,190	372,515	421,666	510,534	446,180	(64,354)
5010201500 BARGAINING SALARIES	-	432	238,636	-	252,510	252,510
5010201510 BARGAINING SALARIES-OT	-	1,595	4,360	-	6,000	6,000
5010201610 ADMIN SALARIES-OT	14,770	8,268	15,260	18,239	19,359	1,120
5029999999 TOTAL FRINGE BENEFITS	301,539	291,170	476,566	468,784	554,262	85,478
5030300013 PARATRANSIT UNIFORMS	5,171	10,827	9,711	25,800	19,416	(6,384)
5049900001 OFFICE SUPPLIES	11	995	213	1,200	1,200	-
5049900011 PARATRANSIT SUPPLIES	-	20	160	-	1,000	1,000
<b>Total Expenses</b>	<b>716,681</b>	<b>685,821</b>	<b>1,166,573</b>	<b>1,024,557</b>	<b>1,299,927</b>	<b>275,370</b>

**TRANSPORTATION OFFICE**

Division 11, 12, 13 (Ops Only Portion), 14

**EXPENSE BUDGET SUMMARY - PARATRANSIT UNION (DIV 14)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010101010 PARATRANSIT OPERATOR WAGES	1,363,306	1,570,259	1,758,042	1,761,840	1,958,647	196,807
5010101020 PARATRANSIT OPER WAGES OT	282,779	258,092	234,055	250,000	250,000	-
5029999999 TOTAL FRINGE BENEFITS	738,569	880,238	876,498	878,315	978,209	99,894
<b>Total Expenses</b>	<b>2,384,654</b>	<b>2,708,589</b>	<b>2,868,595</b>	<b>2,890,155</b>	<b>3,186,856</b>	<b>296,701</b>

**PERSONNEL SUMMARY**

FY26 Proposed FTE's	Classification
1	Chief Transportation Officer
1	Transportation Services Specialist
1	Deputy Chief of Transit Systems & Technology
1	Deputy Chief of Transit Operations
1	Operations System Specialist
1	Superintendent of Transportation
1	Senior Supervisor
12	Field Supervisor
1	Transportation Services Lead
1	Lead Controller
5	Fixed Route Controller
150	Fixed Route Operator
1	Paratransit Operations Manager
1	Paratransit Lead Controller
5	Paratransit Controller
45	Paratransit Operator
1	Customer Service Manager
6	Paratransit Reservationist
<b>235</b>	<b>Total FTEs</b>

**ADMINISTRATION OFFICE - CUSTOMER SERVICE**

**Division 45**

**FUNCTIONS & RESPONSIBILITIES**

The Community and Customer Relations Department are the first point of contact for anyone visiting SunLine, ensuring a welcoming and informative experience. They go beyond basic service by providing tailored transit plans to meet individual needs. They distribute informational materials throughout the Coachella Valley to keep the community informed about SunLine's services. They act as a bridge between customers and SunLine by receiving, recording, and addressing suggestions, requests, and complaints. They ensure inquiries are directed to the right department within SunLine and follow up to confirm issues are resolved. In essence, the Community and Customer Relations Department plays a vital role in building positive relationships with riders and ensuring a smooth and efficient transit experience for everyone.

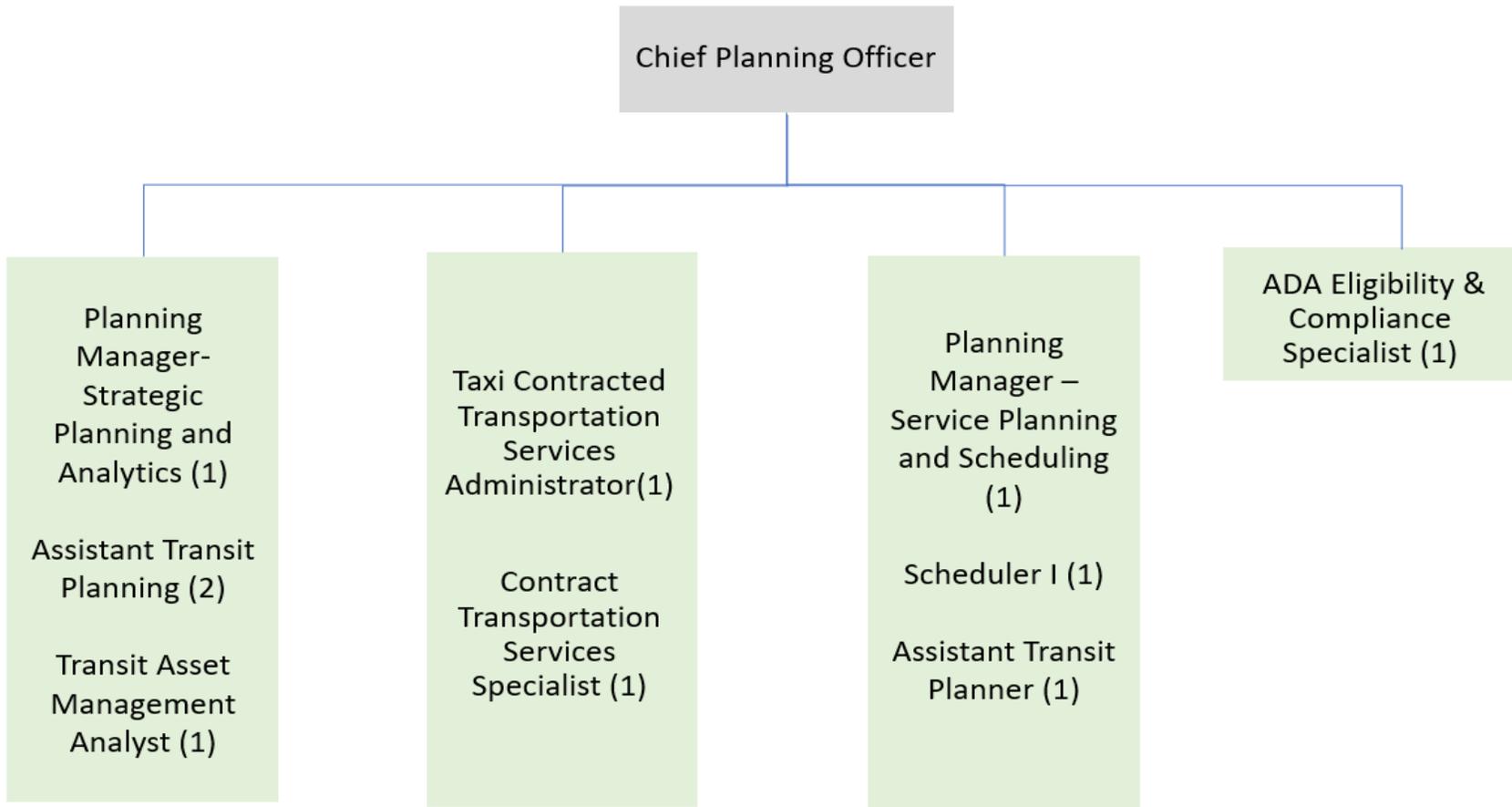
**EXPENSE BUDGET SUMMARY - COSTUMER SERVICE (45)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	407,050	413,465	165,470	239,031	182,894	(56,137)
5010201510 BARGAINING SALARIES-OT	-	2,391	1,478	-	2,300	2,300
5010201610 ADMIN SALARIES-OT	5,189	3,339	2,090	8,500	4,500	(4,000)
5029999999 TOTAL FRINGE BENEFITS	267,779	275,102	37,851	166,807	130,076	(36,731)
5030303240 CONTRACTED SERVICES	2,500	3,000	5,539	3,540	3,540	-
5030400000 TEMPORARY HELP SERVICES	-	-	-	5,000	-	(5,000)
5039900003 PRINTING EXPENSE	21,980	38,513	23,104	30,000	26,000	(4,000)
5049900001 OFFICE SUPPLIES	3,527	3,901	2,548	4,000	4,000	-
5049900002 OFFICE SUPPLIES - POSTAGE	21,886	14,413	21,113	27,000	25,000	(2,000)
5090200000 TRAVEL MEETINGS/SEMINARS	-	703	-	2,500	2,000	(500)
5090800100 EMPLOYEE RECOGNITION	677	895	2,009	1,500	1,500	-
<b>Total Expenses</b>	<b>730,589</b>	<b>755,721</b>	<b>261,202</b>	<b>487,878</b>	<b>381,810</b>	<b>(106,068)</b>

**PERSONNEL SUMMARY**

FY26 Proposed FTE's	Classification
1	Customer Care Coordinator
4	Customer Service Representative
<b>5</b>	<b>Total FTEs</b>

# PLANNING OFFICE



**PLANNING OFFICE**

Division 49

**FUNCTIONS & RESPONSIBILITIES**

The Planning department is responsible for developing short and long range plans, programs, policies, managing detours, administering the bus stop improvements program, fulfilling reporting requirements, planning and scheduling fixed route bus service to support operations, land use and regional mobility planning in coordination with member agencies and various public and private entities to accomplish Sunline's operational and capital mission and vision.

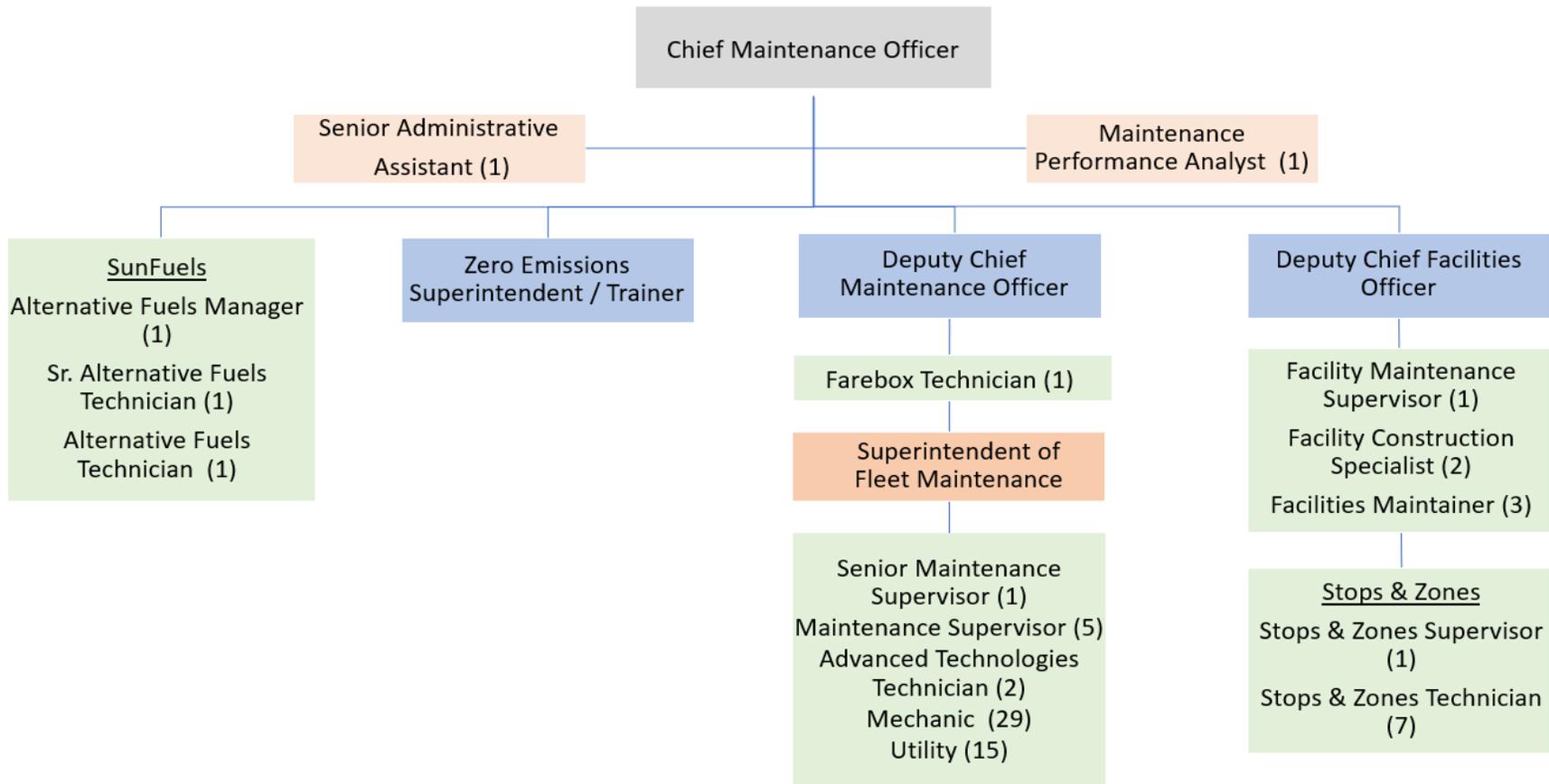
**EXPENSE BUDGET SUMMARY - PLANNING (49)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	187,108	247,211	569,703	400,620	618,754	218,134
5010201610 ADMIN SALARIES-OT	2,092	1,238	1,016	3,250	10,000	6,750
5010700000 ALLOCATED SALARIES	-	-	-	-	(9,500)	(9,500)
5029999999 TOTAL FRINGE BENEFITS	108,580	158,321	277,065	235,003	354,563	119,560
5030200010 CONSULTING	147,726	1,050	-	-	-	-
5030303250 CONSULTING	-	145,835	24,829	280,000	72,780	(207,220)
5030400000 TEMPORARY HELP SERVICES	4,865	-	-	-	-	-
5039900014 SUNRIDE RIDE SHARE EXPENSES	-	-	-	-	1,180,000	1,180,000
5049900001 OFFICE SUPPLIES	1,048	1,306	4,198	6,200	7,000	800
5090100000 MEMBERSHIPS & SUBSCRIPTIONS	-	-	269	50,000	35,000	(15,000)
5090200000 TRAVEL-MEETINGS/SEMINARS	6,481	14,133	44,979	28,000	46,000	18,000
5099900002 MISCELLANEOUS EXPENSE	-	-	227	5,000	2,000	(3,000)
<b>Total Expenses</b>	<b>457,901</b>	<b>569,094</b>	<b>922,286</b>	<b>1,008,073</b>	<b>2,316,597</b>	<b>1,308,524</b>

**PERSONNEL SUMMARY**

FY26 Proposed FTE's	Classification
1	Chief Planning Officer
1	Planning Manager - Strategic Planning and Analytics
2	Assistant Transit Planning
1	Transit Asset Management Analyst
1	Planning Manager - Service Planning and Scheduling
1	Scheduler I
1	Assistant Transit Planner
1	ADA Eligibility & Compliance Specialist
1	Contracted Transportation Services Specialist
1	Taxi Contracted Transportation Services Administrator
<b>11</b>	<b>Total FTEs</b>

# MAINTENANCE OFFICE



**MAINTENANCE OFFICE - SUNFUELS**

**Division 10**

**FUNCTIONS & RESPONSIBILITIES**

Effective maintenance of the H2 and CNG fueling stations is critical for ensuring these essential infrastructure assets' safety, reliability, and compliance. By implementing rigorous maintenance practices, such as; routine inspections, calibration checks, leak detection, emergency shutdown systems, pressure monitoring, and preventative maintenance, SunLine Transit Agency safeguards the performance and lifespan of our H2 and CNG fueling stations.

**EXPENSE BUDGET SUMMARY - SUNFUELS (DIV 10)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	108,149	204,478	225,435	223,042	229,905	6,863
5010201610 ADMIN SALARIES-OT	1,049	1,676	1,423	3,500	2,300	(1,200)
5010700000 ALLOCATED SALARIES	20,826	20,064	22,928	25,000	25,000	-
5029999999 TOTAL FRINGE BENEFITS	115,049	142,678	151,212	155,723	172,639	16,916
5030500009 CONTRACT SVC- O&M	-	-	57,461	373,000	231,923	(141,077)
5030500010 CONTRACT SVC-GENERAL	25,884	26,466	33,623	35,000	40,000	5,000
5030500011 CONTRACT SVC-H2	1,337	28,173	5,506	-	-	-
5030500012 UNIFORMS	1,392	1,541	1,377	2,000	2,000	-
5030600900 ANSWERING SERVICES	368	387	404	400	400	-
5039900005 SHIPPING/FREIGHT	225	168	24	1,000	1,000	-
5039900007 INVENTORY-SALES TAX	4,918	8,642	7,691	17,500	14,000	(3,500)
5039900008 INVENTORY-FREIGHT CHARGES	1,628	1,843	1,195	4,500	3,500	(1,000)
5049900001 OFFICE SUPPLIES	278	456	428	500	500	-
5049900010 MAT/SUPPLIES--CNG TPALMS	1,510	928	5,172	8,000	9,000	1,000
5049900011 MAT/SUPPLIES--HYDROGEN	189	2,448	4,213	7,000	5,000	(2,000)
5049900012 MAT/SUPPLIES--CNG INDIO	160	355	1,918	4,000	4,000	-
5049900300 REPAIR PARTS-HYDROGEN	17,338	40,607	18,816	30,000	25,000	(5,000)
5049900400 REPAIR PARTS-CNG - TPALMS	25,656	120,824	48,646	80,000	60,000	(20,000)
5049900450 REPAIR PARTS-CNG - INDIO	9,711	32,364	2,317	2,500	10,000	7,500
5050200001 ELECTRICITY-CNG THOUSAND PALMS	131,151	153,729	138,330	150,000	160,000	10,000
5050200002 ELECTRICITY-CNG INDIO	33,829	35,280	35,015	40,000	42,000	2,000
5050200003 ELECTRICITY-HYDROGEN	1,331,241	784,109	403,275	900,000	450,000	(450,000)
5050200004 UTILITIES WATER/SEWER	8,415	8,183	7,914	12,000	12,000	-
5050200020 GAS-CNG THOUSAND PALMS	2,764,172	1,591,562	1,324,240	1,850,000	1,383,750	(466,250)
5050200021 GAS-CNG INDIO	199,894	84,504	84,161	175,000	100,000	(75,000)
5050200022 GAS-HYDROGEN	182	197	196	5,000	-	(5,000)
5070500000 FUEL TAXES	110,208	93,423	84,954	110,000	90,000	(20,000)
5090200000 TRAVEL MEETINGS/SEMINARS	100	3,197	13,536	25,000	20,000	(5,000)
5090801000 BANK ADJUSTMENTS/FEES	23,490	20,426	22,950	25,000	28,000	3,000
5099900004 PERMITS & LICENSES	434	2,384	1,928	7,500	4,000	(3,500)
5099909000 ALLOCATED INDIRECT EXPENSES	31,586	38,498	41,535	45,000	45,000	-
5100200000 SELF CONSUMED FUEL	(4,009,829)	(2,847,737)	(2,196,294)	(4,062,246)	(4,038,056)	24,190
<b>Total Expenses</b>	<b>960,542</b>	<b>601,848</b>	<b>551,528</b>	<b>254,919</b>	<b>(867,139)</b>	<b>(1,122,058)</b>

**PERSONNEL SUMMARY**

FY26 Proposed FTE's	Classification
1	Alternative Fuels Manager
1	Sr. Alternative Fuels Technician
1	Alternative Fuels Technician
<b>3</b>	<b>Total FTEs</b>

**MAINTENANCE OFFICE - FLEET MAINTENANCE**

**Division 21, 22, 13 (Fleet Maintenance Portion Only)**

**FUNCTIONS & RESPONSIBILITIES**

Maintaining the SunLine transit bus fleet is essential for ensuring safe, efficient, and reliable transportation services for the passengers of the Coachella Valley. By investing in proactive maintenance practices and allocating resources strategically, we aim to maximize the reliability, safety, and longevity of our fleet while optimizing operational costs. Through implementing preventive, corrective, and predictive maintenance practices, leveraging advanced fleet management systems, and investing in technician training, we optimize the performance, safety, and sustainability of our bus fleet.

**EXPENSE BUDGET SUMMARY - FLEET MAINTENANCE ADMIN (DIV 21)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	572,978	566,193	602,492	734,058	722,926	(11,132)
5010201510 BARGAINING SALARIES-OT	-	857	3,753	-	6,582	
5010201610 ADMIN SALARIES-OT	12,352	68,320	57,158	-	65,810	65,810
5029999999 TOTAL FRINGE BENEFITS	426,971	396,614	327,859	477,834	477,328	(506)
5030303250 CONSULTING	-	97,740	286,585	137,500	12,000	(125,500)
5030400000 TEMPORARY HELP SERVICES	7,834	-	-	2,500	-	(2,500)
5039900006 OUTSIDE REPAIR-FIXED ROUTE	82,571	50,233	13,333	50,000	30,000	(20,000)
5039900007 OUTSIDE REPAIR-SUPPORT VEHICLE	2,226	3,653	-	4,000	4,000	-
5039900008 AT BUS WARRANTY	-	-	-	-	-	-
5040100101 LUBRICANTS-OIL	88,381	92,988	55,733	96,500	65,000	(31,500)
5040100102 FREON & COOLANT	37,416	46,049	28,454	50,000	45,000	(5,000)
5040101000 FUEL-CNG SUPPORT VEHICLES	61,026	51,832	85,071	35,000	90,000	55,000
5040101001 FUEL-CNG FIXED ROUTE	2,103,134	1,565,985	804,831	1,486,455	850,000	(636,455)
5040102000 FUEL-UNLEADED	16,726	8,444	17,761	17,600	17,600	-
5040102100 FUEL-DIESEL	45,668	53,050	26,237	50,000	-	(50,000)
5040102200 FUEL-HYDROGEN	1,377,506	868,060	443,606	659,356	497,505	(161,851)
5040102300 FUEL- LIQUID HYDROGEN	-	-	1,536,080	784,471	1,597,172	812,701
5040103000 FUEL-FUEL CELL	-	-	-	-	-	-
5040200001 TIRES-FIXED ROUTE	153,784	156,332	184,168	165,000	220,000	55,000
5040200002 TIRES-SUPPORT VEHICLES	7,381	9,363	928	13,000	10,000	(3,000)
5040200003 TIRES-TOOLS & SERVICE SUPPLIES	-	-	-	-	-	-
5040200004 TIRES-FUEL CELL	-	-	-	-	-	-
5049900001 OFFICE SUPPLIES	5,002	2,715	1,742	2,500	3,500	1,000
5049900025 GLASS REPLACEMENT-SUPPORT VEH.	1,150	490	1,047	1,500	2,500	1,000
5090200000 TRAVEL MEETINGS/SEMINARS	13,334	14,160	26,223	15,000	35,000	20,000
5090200001 TRAINING	-	-	359	10,000	5,000	(5,000)
5090201000 EMPLOYEE EXPENSES	933	1,037	768	2,500	2,500	-
5090400100 DISCOUNTS TAKEN	(12)	-	-	-	-	-
5120001000 RENTAL OF TRAILER	6,012	6,614	4,810	6,025	7,300	1,275
5140001000 VEHICLE OPERATING LEASES	24,244	374,067	322,400	260,400	-	(260,400)
<b>Total Expenses</b>	<b>5,046,616</b>	<b>4,434,793</b>	<b>4,831,400</b>	<b>5,061,199</b>	<b>4,766,723</b>	<b>(301,058)</b>

**MAINTENANCE OFFICE - FLEET MAINTENANCE**

Division 21, 22, 13 (Fleet Maintenance Portion Only)

**EXPENSE BUDGET SUMMARY - FLEET MAINTENANCE UNION (DIV 22)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY26		
				FY25 Approved Budget	Proposed Budget	Variance
5010201200 MECHANIC WAGES	1,580,036	2,042,427	2,004,097	2,228,217	2,330,491	102,274
5010201210 MECHANIC OVERTIME	195,052	303,137	258,736	200,000	200,000	-
5029999999 TOTAL FRINGE BENEFITS	884,049	1,072,992	967,107	1,126,564	1,210,955	84,391
5030300014 UNIFORMS	15,870	17,476	20,791	20,000	30,000	10,000
5030500001 FIRE EXTINGUISHERS	1,306	-	-	1,500	1,500	-
5030500002 RADIO MAINTENANCE	2,144	200	-	4,000	2,000	(2,000)
5030500003 EQUIPT REPAIRS-SHOP EQUIPMENT	8,447	21,094	26,729	25,000	30,000	5,000
5030500004 EQUIPT REPAIRS-VAULT & FAREBOX	1,208	1,041	353	1,500	1,500	-
5039900004 CONTRACT SVC-MAINT	126,823	127,368	172,684	135,000	180,000	45,000
5039900005 CONTRACT SVC-FREIGHT	4,279	848	2,714	4,500	4,000	(500)
5039900006 CONTRACT SVC - TOWING	52,421	46,880	55,990	75,000	70,000	(5,000)
5039900007 INVENTORY-SALES TAX	123,550	120,581	145,562	125,000	150,000	25,000
5039900008 INVENTORY-FREIGHT CHARGES	20,233	16,873	20,171	20,000	23,000	3,000
5049900015 COSMETIC MAINTENANCE EXTERIOR	3,388	2,881	1,082	4,000	-	(4,000)
5049900016 CLEANING SUPPLIES-VEHICLES	13,169	17,828	10,378	25,000	25,000	-
5049900017 SHOP SUPPLIES MISC	39,324	46,380	52,249	60,000	62,000	2,000
5049900018 MECHANIC TOOLS/SHOES	24,239	31,784	32,934	47,500	50,000	2,500
5049900019 SMALL TOOLS & EQUIPMENT	26,423	23,279	51,389	35,000	45,000	10,000
5049900020 DECALS-FIXED ROUTE	40,371	4,747	5,445	15,000	15,000	-
5049900021 REPAIR PARTS- FIXED ROUTE	1,457,768	1,691,231	996,461	1,550,000	1,047,631	(502,369)
5049900022 REPAIR PARTS-SUPPORT VEHICLES	63,503	71,502	50,422	70,000	65,000	(5,000)
5049900023 VANDALISM/SEAT REPAIRS	-	21	-	-	-	-
5049900024 REPAIR PARTS-FUEL CELL	12,775	21,778	235,049	100,000	260,000	160,000
5070500000 FUEL TAXES	10,795	10,092	10,487	14,000	13,000	(1,000)
5099900004 PERMITS & LICENSES	11,876	9,133	17,370	20,000	20,000	-
<b>Total Expenses</b>	<b>4,719,049</b>	<b>5,701,571</b>	<b>5,138,201</b>	<b>5,906,781</b>	<b>5,836,077</b>	<b>(70,704)</b>

**EXPENSE BUDGET SUMMARY - MAINTENANCE PARATRANSIT (DIV 13 FLEET MAINTENANCE ONLY PORTION)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY26		
				FY25 Approved Budget	Proposed Budget	Variance
5039900001 PARATRANSIT CONTRACT SVC-TOWING	1,800	4,676	3,760	6,500	6,000	(500)
5039900002 PARATRANSIT OUTSIDE VEHICLE REPAIR	484	1,774	-	2,500	2,500	-
5039900003 GENERAL SERVICES	16,560	19,740	21,840	24,000	30,000	6,000
5040101001 PARATRANSIT FUEL-CNG	468,136	362,277	343,385	398,551	350,000	(48,551)
5040200005 PARATRANSIT TIRES	42,141	52,633	55,161	56,000	62,000	6,000
5049900006 PARATRANSIT REPAIR PARTS	145,541	214,662	229,562	176,000	225,000	49,000
5049900007 PARATRANSIT GLASS REPLACEMENT	920	615	1,080	1,000	2,000	1,000
5049900200 DECALS	-	-	1,691	6,000	6,000	-
<b>Total Expenses</b>	<b>675,582</b>	<b>656,378</b>	<b>656,479</b>	<b>670,551</b>	<b>683,500</b>	<b>12,949</b>

**MAINTENANCE OFFICE - FLEET MAINTENANCE**

Division 21, 22, 13 (Fleet Maintenance Portion Only)

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**PERSONNEL SUMMARY**

FY26 Proposed FTE's	Classification
1	Chief Maintenance Officer
1	Senior Administrative Assistant
1	Maintenance Performance Analyst
1	Deputy Chief Maintenance Officer
1	Zero Emissions Superintendent/Trainer
1	Superintendent of Fleet Maintenance
1	Senior Maintenance Supervisor
5	Maintenance Supervisor
1	Farebox Tech
29	Mechanic
15	Utility
2	Advanced Technologies Technician
<b>59</b>	<b>Total FTEs</b>

**MAINTENANCE OFFICE - FACILITY MAINTENANCE**

**Division 23 & 24**

**FUNCTIONS & RESPONSIBILITIES**

The state of good repair for SunLine facilities, and assets is essential for ensuring safety, performance, and functionality. By prioritizing infrastructure maintenance, safety and security systems, environmental controls, ADA accessibility, and equipment maintenance SunLine can ensure the reliability, safety, and accessibility of their facilities.

**EXPENSE BUDGET SUMMARY - FACILITY MAINTENANCE THOUSAND PALMS (TP) (DIV 23)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	202,993	69,352	89,817	127,685	95,650	(32,035)
5010201210 GROUNDSKEEPER WAGES	177,542	257,038	274,797	311,239	296,504	(14,735)
5010201610 ADMIN SALARIES-OT	225	657	2,790	-	5,650	5,650
5010201710 GROUNDSKEEPER OVERTIME	7,724	9,872	6,601	16,785	8,406	(8,379)
5010700000 ALLOCATED SALARIES	(2,943)	(2,569)	(2,833)	(2,796)	(3,540)	(744)
5029999999 TOTAL FRINGE BENEFITS	220,487	215,964	219,452	307,358	280,196	(27,162)
5030500005 CONTRACT SVC-HAZ WASTE REMOVE	20,890	47,249	25,388	50,000	30,000	(20,000)
5030500010 CONTRACT SVC-GENERAL	49,346	52,604	42,333	65,200	53,000	(12,200)
5030600000 CONTRACT SVC-CUSTODIAL	80,919	82,280	86,587	90,000	107,000	17,000
5030600100 AIR CONDITIONING EXPENDITURES	15,873	15,127	15,288	20,000	20,000	-
5030600200 UNIFORMS SERVICE EXPENDITURES	1,450	2,053	2,239	2,300	3,000	700
5030600300 RENTAL EQUIPMENT EXPENSES	3,930	4,742	9,708	12,500	12,500	-
5030600500 PEST CONTROL SERVICE	3,260	3,781	3,716	4,500	4,500	-
5030600600 CONTRACT SERVICES-A/C	9,572	16,293	-	21,500	20,000	(1,500)
5030600700 FIRE EXTINGUISHERS	1,160	1,365	1,478	1,200	1,200	-
5030600800 FLOOR MAT RENTAL	6,231	6,284	6,748	7,500	8,300	800
5030600975 RADIO REPEATER HILLTOP RENTAL	28,866	32,460	36,714	18,000	-	(18,000)
5040300100 PLUMBING RELATED EXPENDITURES	5,902	8,958	4,407	12,000	10,000	(2,000)
5040300200 ELECTRICAL RELATED EXPENDITURE	15,454	9,916	10,673	20,000	15,000	(5,000)
5040300600 SHOE ALLOWANCE	1,091	1,367	577	2,500	2,500	-
5049900001 OFFICE SUPPLIES	151	138	472	500	500	-
5049900002 BOARD ROOM AND ZWEIG SUPPLIES	6,254	2,627	3,444	7,000	7,000	-
5049900026 FACILITY MAINTENANCE-MAIN FAC	37,920	56,265	37,945	72,500	58,000	(14,500)
5049900030 CLEANING SUPPLIES-MAIN FAC	1,627	1,851	2,198	2,500	2,500	-
5050200001 UTILITIES MAIN FACILITY	271,570	302,862	316,747	330,000	340,000	10,000
5050200003 TRASH PICKUP- MAIN FACILITY	25,692	28,417	27,528	30,000	30,000	-
<b>Total Expenses</b>	<b>1,193,185</b>	<b>1,226,952</b>	<b>1,224,811</b>	<b>1,529,971</b>	<b>1,407,866</b>	<b>(122,105)</b>

**MAINTENANCE OFFICE - FACILITY MAINTENANCE**

**Division 23 & 24**

**EXPENSE BUDGET SUMMARY - FACILITY MAINTENANCE INDIO/COACHELLA (DIV 24)**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5030500010 CONTRACT SVC-GENERAL	2,209	410	436	2,400	2,400	-
5030600000 CONTRACT SVC-CUSTODIAL	25,105	30,012	25,393	35,000	35,000	-
5030600100 AIR CONDITIONING EXPENDITURES	1,203	449	-	2,000	-	(2,000)
5030600500 PEST CONTROL SERVICE	1,395	1,520	1,403	1,700	1,700	-
5030600600 CONTRACT SERVICES-AC	575	1,077	-	2,000	2,000	-
5030600700 FIRE EXTINGUISHERS	289	355	-	350	350	-
5030600800 FLOOR MAT RENTAL	41	-	-	500	500	-
5040300100 PLUMBING RELATED EXP	503	1,829	-	2,500	2,500	-
5040300200 ELECTRICAL RELATED EXPENDITURE	4,685	1,583	468	2,500	2,500	-
5049900027 FACILITY MAINT-INDIO FAC	8,659	7,691	13,381	12,000	12,000	-
5049900031 CLEANING SUPPLIES-INDIO FACILI	279	-	-	300	300	-
5050200002 UTILITIES INDIO/COACHELLA	24,234	29,126	25,745	37,000	30,000	(7,000)
5050200004 TRASH PICKUP-INDIO/COACHELLA	17,597	20,665	20,215	21,000	22,000	1,000
5050202000 UTILITIES GAS & WATER	3,274	4,140	3,086	4,000	4,000	-
<b>Total Expenses</b>	<b>90,050</b>	<b>98,857</b>	<b>90,128</b>	<b>123,250</b>	<b>115,250</b>	<b>(8,000)</b>

**PERSONNEL SUMMARY**

FY26 Proposed FTE's	Classification
1	Deputy Chief Facilities Maintenance
1	Facilities Maintenance Supervisor
2	Facilities Construction Specialist
3	Facilities Maintainer
<b>7</b>	<b>Total FTEs</b>

## MAINTENANCE OFFICE - STOPS & ZONES

Division 25

### FUNCTIONS & RESPONSIBILITIES

Prioritizing the maintenance of transit bus stops is crucial for ensuring the safety, comfort, and accessibility of passengers using public transportation. The Stops and Zones department focuses on maintaining structural integrity, accessibility compliance, cleaning and sanitation, shelter maintenance, signage and information displays, lighting and security, and passenger amenities. By focusing on these aspects of transit bus stop maintenance, SunLine Transit Agency creates a safe, comfortable, and accessible environment for passengers to wait for buses, ultimately enhancing the overall public transportation experience.

### EXPENSE BUDGET SUMMARY - STOPS & ZONES (DIV 25)

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimates	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010200500 ADMIN SALARIES	66,356	65,235	75,256	-	-	-
5010201500 BARGAINING SALARIES	312,140	329,809	353,743	404,275	397,983	(6,292)
5010201510 BARGAINING OVERTIME	5,370	8,604	8,404	-	10,000	10,000
5029999999 TOTAL FRINGE BENEFITS	223,492	286,719	268,406	279,908	308,777	28,869
5030600200 UNIFORMS	3,674	3,832	3,836	4,500	4,500	-
5030600250 EQUIPMENT RENTAL	2,070	3,869	2,326	4,500	4,500	-
5040102000 UNLEADED GASOLINE	2,692	2,388	2,162	3,000	3,000	-
5040102001 DIESEL FUEL	63	59	-	200	200	-
5040300600 SHOE ALLOWANCE	2,139	2,548	796	2,500	2,500	-
5049900001 OFFICE SUPPLIES	64	-	371	300	300	-
5049900029 BUS STOP SUPPLIES	76,201	76,094	80,197	75,000	80,000	5,000
5090201000 EMPLOYEE EXPENSES	248	-	385	1,500	1,500	-
<b>Total Expenses</b>	<b>694,510</b>	<b>779,157</b>	<b>795,881</b>	<b>775,683</b>	<b>813,260</b>	<b>37,577</b>

### PERSONNEL SUMMARY

FY26 Proposed FTE's	Classification
1	Stops & Zones Supervisor
7	Stops & Zones Technician
<b>8</b>	<b>Total FTEs</b>



# *SunLine*

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## SunLine Transit Agency

**DATE:** June 25, 2025 **ACTION**

**TO:** Finance/Audit Committee  
Board of Directors

**FROM:** Luis Garcia, Chief Financial Officer

**RE:** Award of Contract for Financial Auditing Services

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### **Recommendation**

Recommend that the Board of Directors (Board) delegate authority to the CEO/General Manager, or designee, to negotiate and execute a one (1) year contract, with four (4) one-year option terms, with Brown Armstrong Accountancy Corporation (Brown Armstrong) for financial auditing services for a not-to-exceed amount of \$337,400, in a form approved by legal counsel.

### **Background**

SunLine Transit Agency (SunLine) and SunLine Services Group (SSG) are required by their Joint Powers Agreements to undergo independent annual financial audits. In addition, SunLine must complete supplementary audit reviews to comply with the requirements of the California Transportation Development Act (TDA) and Title 2, Part 200 of the Code of Federal Regulations, which mandates single audits for entities expending more than \$1,000,000 in federal funds annually.

In accordance with SunLine's Financial Audit Rotation Policy (Policy B-060118, adopted July 22, 2020), a new financial auditing agreement must be established at least every five (5) years. Any contractor serving for five (5) or more consecutive years shall not be eligible to participate in a new solicitation process until one (1) year after the expiration of their contract term (inclusive of extensions) unless the Board determines that such exclusion would not be in the public interest under specified circumstances. The current five-year agreement with Vasquez & Company concluded on April 30, 2025.

On April 1, 2025, staff issued Request for Proposals (RFP) No. 25-083 for Financial Auditing Services, consistent with the solicitation requirements in Policy B-060118. The RFP was publicly advertised in a newspaper of general circulation and posted on SunLine's website.

On May 12, 2025, SunLine received three (3) responsive proposals. The proposals were evaluated based on firm experience and past performance, qualifications of key personnel, completeness of response, and price in accordance with the criteria listed in

the RFP. An evaluation committee consisting of three (3) Finance department management staff conducted the review. Based on the evaluation, Brown Armstrong was identified as offering the best overall value for SunLine. Staff performed a price analysis and determined the prices to be fair, reasonable, and consistent with an independent cost analysis. The firm has extensive experience auditing California transit agencies, including the Riverside Transit Agency and the Riverside County Transportation Commission.

### **Financial Impact**

The total estimated cost of the five-year contract is \$337,400 and will be incorporated into the annual operating budgets for both SunLine and SSG. The total cost for year one of the contract will not exceed \$67,480 and is included in the FY26 operating budgets.

### **Performance Goal**

**Goal 3: Organizational Health & Resiliency** – Optimize SunLine’s fiscal and overall organizational strength to allow for growth and to better withstand unexpected challenges (e.g., COVID-19 financial impact).

#### **Approved/Reviewed by:**

Mona Babauta, CEO/General Manager  
Catherine J. Groves, General Counsel

#### Attachments:

- [Item 11a](#) – Price Analysis
- [Item 11b](#) – Solicitation List



REQUEST FOR PROPOSAL  
FINANCIAL AUDITING  
25-083

**PRICE ANALYSIS**

	Brown	Pun	Crowe	
Year 1	\$ 67,480.00	\$ 95,000.00	\$ 104,550.00	
Year 2	\$ 67,480.00	\$ 99,750.00	\$ 109,985.00	
Year 3	\$ 67,480.00	\$ 104,738.00	\$ 114,610.00	
Year 4	\$ 67,480.00	\$ 109,974.00	\$ 121,145.00	
Year 5	\$ 67,480.00	\$ 115,473.00	\$ 127,815.00	
<b>Total Proposal Value for 5 year period</b>	<b>\$ 337,400.00</b>	<b>\$ 524,935.00</b>	<b>\$ 578,105.00</b>	

	Difference	Delta
Difference between Brown and Crowe	\$ (240,705.00)	-71.34%
Difference between Brown and Pun	\$ (187,535.00)	-55.58%

There was adequate price competition for the Financial Auditing Services Agreement since three (3) bidders independently contended for the contract. The award is based on the highest evaluated proposal factors; Firm Experience & Past Performance, Key Personnel, Completeness of Response and Price. In comparing proposals received, Brown Armstrong Accountancy scored the highest with a total of 273 out of 300 points, Crowe LLP at 251.84 and The Pun Group, LLP at 245.43.

Based upon the evaluation team's review of the proposals and the analysis contained herein, it has been determined Brown Armstrong Accountancy will provide the best value for the Agency.

Prepared by:

**Sara Parrish**

Sara Parrish

06/06/25

PLANETBID SOLICITATION 25-083 - LIST FINANCIAL AUDITING						
Company Name	Address	City	State	Zip	Contact Name	Email
<b>Brown Armstrong Accountancy Corporation</b>	<b>4200 Truxtun Avenue Suite 300</b>	<b>Bakersfield</b>	<b>California</b>	<b>93309</b>	<b>Madeline Johnson</b>	<b>mjohnson@ba.cpa</b>
<b>Crowe LLP</b>	<b>650 Town Center Drive Suite 740</b>	<b>Costa Mesa</b>	<b>California</b>	<b>92626</b>	<b>Delia Bruntz</b>	<b>proposal.center@crowe.com</b>
Davis Farr LLP	18201 Von Karman Ave. Suite 1100	Irvine	California	92612	Meagan	admin@davisfarr.com
Harshwal & Company, LLP	11405 W. Bernardo Court, Suite A	San Diego	California	92127	Sanwar Harshwal	info@harshwal.com
LSL, LLP	500 Technology Drive Suite 350	Irvine	California	92618	Brandon Young	proposals@lslcpas.com
Macias Gini & O'Connell LLP	500 Capitol Mall Suite 2200	Sacramento	California	95814	Eileen Nyberg	rffadmin@mgocpa.com
Pravision LLC	2525 Merlot Ln	Livermore	California	94550	Praveena Jogi	praveena@pravision.com
Rogers Anderson Malody & Scott, LLP	735 E. Carnegie Drive, Suite 100	San Bernardino	California	92408	Scott Manno	smanno@ramscpa.net
Saitech Inc	42640 Christy Street	Fremont	California	94587	Shalini Kalra	govtsales@esaitech.com
<b>The Pun Group, LLP</b>	<b>200 E Sandpointe Ave Suite 600</b>	<b>Santa Ana</b>	<b>California</b>	<b>92707</b>	<b>Frances Kuo</b>	<b>info@pungroup.com</b>
Vasquez + Company LLP	655 N. Central Avenue Suite 1550	Glendale	California	91203	Roger A. Martinez	ram@vasquezcpa.com
<b>Footnote: Bold font indicates companies that submitted bids</b>						

## SunLine Transit Agency

**DATE:** June 25, 2025 **ACTION**

**TO:** Board Operations Committee  
Board of Directors

**FROM:** Edith Hernandez, Director of Board and Legislative Affairs

**RE:** Revised Advertising Policy

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### **Recommendation**

Recommend that the Board of Directors (Board) approve the attached revised Policy #B-020598, the Advertising Policy.

### **Background**

SunLine Transit Agency's (SunLine) Advertising Policy (Policy) seeks to generate additional revenue to supplement operating costs by selling advertising space on SunLine vehicles (interior and exterior locations) and in bus shelters. The Policy was last updated in 2018. Since then, staff has identified areas for improvement in the Policy to align with best practices and current legal requirements, clarify the rules for both potential advertisers and staff administering the Policy, and further maximize revenues through efficient administration.

The advertising spaces subject to the Policy, which include certain exterior and interior spaces on buses and certain spaces on bus shelters, are non-public forums for purposes of free speech protected by the First Amendment. In non-public forums, SunLine may impose content-based restrictions on speech so long as such restrictions are reasonable and viewpoint neutral. Accordingly, the Policy is intended to be uniform and viewpoint neutral, and to create a professional advertising environment that will maximize advertising revenue and minimize interference with or disruption to the SunLine transit system. However, the current Policy prohibits political advertising that "opposes the nomination or election of a candidate for public office, the investigation, prosecution or recall of a public official or the passage of a levy or bond issue," but permits all other types of political advertising. This approach is inconsistent with the stated objectives of the Policy and is susceptible to legal challenge because it allows certain types of political viewpoints and excludes others. Accordingly, the revised Policy excludes all political ads regardless of viewpoint in accordance with the legal standards applicable to non-public forums.

Other changes to the Policy include:

- Identifying the advertising spaces that are subject to the Policy.
- Removing excluded categories of advertising that are difficult to administer or may expose SunLine to legal risk, such as excluding ads that encourage people to use forms of transportation other than SunLine's services.
- Further defining the types of Permitted Advertising, which include Commercial Advertising, Public Service Advertising, and Cross-Promotional Advertising.
- Clarifying SunLine's authority to waive advertising fees for cities within its service area wishing to advertise city sponsored events, city programs, or city agencies on a SunLine bus shelter located within the city's jurisdiction so long as (i) the bus shelter advertising space is not occupied by a revenue generating advertisement, and (ii) the advertisement is consistent with the Policy.
- Clarifying the process for appealing the GM/CEO's decision to reject an advertisement to the Board.
- Removing the process by which cities are given an opportunity to provide input on proposed ads on bus shelters within their jurisdiction. This secondary layer of review has resulted in unnecessary delays in processing advertising requests.
- Consolidating and rephrasing language to improve clarity. For example, the current Policy expressly excludes ads that support or oppose any labor organization or any action by, on behalf of, or against any labor organization. Depending on the specific ad content, such labor-related ads would likely constitute excluded political or public issue ads, so there is no need to call out labor-related ads as an additional discrete category of excluded advertising.

### **Financial Impact**

There is no financial impact. Advertising revenues will depend on market demand.

### **Performance Goal**

**Goal 4: Valuable Community Asset** – Be seen as a highly valued and integral contributor to shaping socially engaged, economically vibrant, and healthy communities throughout the Coachella Valley.

### **In Collaboration with:**

Carmen Cubero, Marketing & Events Manager

### **Approved/Reviewed by:**

Mona Babauta, CEO/General Manager

Catherine J. Groves, General Counsel

### **Attachments:**

- [Item 12a](#) – SunLine Advertising Policy B-020598 – Redlined
- [Item 12b](#) – SunLine Advertising Policy B-020598 – Redlined Changes Accepted

SunLine Transit Agency  
Advertising Policy  
Policy No: B-020598

Adopted: 01/28/98  
Revised: ~~04/25/18~~ 06/25/25

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# ADVERTISING POLICY

## PURPOSE AND SCOPE

SunLine Transit Agency (STA), acting in a proprietary capacity, ~~operates public bus service in the Coachella Valley. STA's desire to sell is engaged in the sale of~~ advertisement space ~~stems from the recognized need~~ to earn revenues to supplement operating costs that are not otherwise met through farebox revenue and local, state and federal levies, taxes and grants.

## SCOPE

This policy applies to ~~the sale of all forms of advertising space in and upon STA's property and transit vehicles ("Transit Facilities"), including but not limited to: (1) advertising on the exterior of STA buses, (2) advertising on the interior of STA buses, and (3) advertising displayed on bus shelters in STA's service area~~ all SunLine Transit Agency employees or contractors.

## POLICY

~~It is STA's policy that its buses, bus shelters and any and all other forums for~~ By allowing limited types of advertising under on the Transit Facilities, STA does not intend to create this policy are not a public forums for political discourse or expressive activity, ~~or.~~

~~These areas are not intended to provide a forum for all types of advertisements, but only the limited advertisements accepted under the policy.~~ All advertising shall be subject to this uniform view-point neutral policy.

~~STA will not permit the types of advertising defined as Excluded Advertising in this policy. Excluded Advertising: Copy may not be displayed and, if displayed, will be removed by STA if it falls within the categories listed below.~~

~~By not allowing Excluding said a~~ Advertising, STA seeks to maintain a professional advertising environment that will maximize advertising revenue and minimize interference with or disruption to its transit system.

STA further seeks to maintain an image of neutrality on political, religious and

other issues that are not the subject of eCommercial Advertising and ~~are may~~ instead be the subject of public debate and concern. Finally, STA's goal is to continue to build and retain ridership.

## **EXCLUDED ADVERTISING**

~~Subject thereto, a proposed An~~ advertisement cannot be displayed or maintained on Transit Facilities if information contained in the advertisement falls within one or more of the following categories of Excluded Advertising, as will be excluded if determined by SunLine, in its sole discretion, determines it:

- ~~1. Contains d~~Defamatory- or, libelous or obscene matter likely to hold up to scorn or ridicule a person or group of persons.
2. Is false, misleading or deceptive.

~~Supports or opposes any labor organization or any action by, on behalf of or against any labor organization.~~

3. Relates to or promotes any illegal activity.
4. ~~Contains implicit or explicit sexual references, pictures or text, or includes material harmful to minors~~Obscene or pornographic.
5. Depicts or promotes the sale of alcohol, cannabis, tobacco products, any illegal products, ~~s, r~~ service, ~~1~~ or entity, ~~1~~ and/or firearms.

~~6.~~ Depicts or advocates violence.

~~7.~~

~~8.6. \_\_\_\_\_ Includes language that is obscene, vulgar or profane.~~

~~9.7. \_\_\_\_\_~~ Demeans, degrades or has the effect of promoting discrimination against any group or individual on the basis of race, color, religion, national origin, age, sex, disability, ancestry or sexual orientation.

~~8. \_\_\_\_\_~~ Constitutes a political or public issue defined as advertising that contains political speech referring to a particular ballot question, initiative, petition, referendum, candidate, political party, or viewpoint or expresses or advocates opinions or positions upon any of the foregoing or on a matter of public debate about economic, political, religious, or social issues. This prohibition includes any advertisement referring to or depicting a candidate for public office in any context. Opposes the nomination or election of a candidate for public office, the investigation, prosecution or recall of a public official or the passage of a levy or bond issue.

~~10.9. \_\_\_\_\_~~ Constitutes an unauthorized endorsement defined as advertising that implies or declares that STA endorses a product, service, viewpoint, event or

program. This definition does not include advertising for a service, event or program for which STA is an official sponsor, co-sponsor or participant.

~~44.10.~~ Constitutes a religious advertisement defined as advertising that contains direct or indirect reference to religion, or to a deity or deities, or which includes ~~reference to~~ the existence, non-existence or other characteristics of any deity or deities, or to any religious creed, denomination, belief, tenet, cause or issue relating to, (including opposing or questioning) any religion. This includes the depiction of, text, symbols, or images commonly associated with any religion or with any deity or deities, or any religious creed, denomination, belief, tenet, cause or issue relating to, (including opposing or questioning) any religion.

~~Advertising that encourages person to refrain from using SunLine Transit Agency services or public transit in general.~~

~~Advertising that explicitly and directly promotes or encourages the use or means of transportation in direct competition with public transit.~~

## **PERMITTED ADVERTISING**

In permitting limited advertising, STA seeks only to supplement fare revenue and other income that funds its operations and to promote its services.

~~STA does not desire to have its passengers subject to advertisements containing controversial material relating to political, religious or other issues about which public opinion can be widely divergent.~~

To realize the maximum benefit from the sale of advertising space, all advertising ~~programs~~ must be managed in a manner that will generate as much revenue as practicable while ensuring that the advertising does not discourage use of the system, does not diminish STA's reputation in the communities it serves, and is consistent with the goal of providing safe and efficient public transportation. To attain these objectives, STA will only allow advertising on its Transit Facilities that do not qualify as Excluded Advertising, as defined above ("Permitted Advertising"). Permitted Advertising includes:

1. Commercial Advertising, defined as advertising for has a the sole purpose of promoting or soliciting the sale, rental, or distribution of a business or to sell products, goods, ~~or services,~~ entertainment, events, programs, or real or personal property for commercial purposes. It does not include advertising that also conveys ~~both promotes a business or offers to sell products, goods or services and also conveys a political or religious message or can be construed as issue advocacy or which expresses an opinion or position,~~ content that constitutes Excluded Advertising under this policy.

2. ~~Operations advertising is permitted. This is defined as a~~Advertising that promotes STA and its services.
3. ~~Governmental advertising is permitted. This is defined as a~~Public Service Advertising, defined as advertising proposed by either a that promotes programs and events of governmental entytyies, political subdivisions and state agencies.academic institution or tax-exempt nonprofit organization that relates to: community, art, culture, education/training, health, provision of children and family services, provision of services and programs that provide support to low income citizens, senior citizens and people with disabilities, or safety or special events, programs and/or messages and does not include or contain any content that constitutes Excluded Advertising. Upon STA's request, nonprofit entities must document their tax-exempt status. Unless the source of the Public Service Advertising is obvious from the content or copy, the advertisement must specifically identify the sponsor of the advertisement or the message.
4. ~~Political advertising is permitted. Ad content must be approved and must state "Paid Advertisement" as part of the creative artwork. The font must be an appropriate size.~~
- 5.4. ~~Entering into barter deals is permitted if Sunline determines that it is a benefit to Sunline Transit Agency.~~Cross-Promotional Advertising, defined as advertising in which STA collaborates with for-profit or non-profit entities to promote using STA as a conveyance to a specific event; such advertising may not contain any content that constitutes Excluded Advertising.
6. ~~Customers requesting advertisement orders will need to provide payment upfront — before each advertising period (flight) begins.~~

## **ADMINISTRATION AND ENFORCEMENT OF POLICY**

Advertisers must pay the applicable fee for the advertising space before the advertisement is installed. STA may, by mutual agreement with a city within its service area, waive this fee for a city wishing to advertise city sponsored events, city programs, or city agencies on a STA bus shelter located within the city's jurisdiction so long as (i) the bus shelter advertising space is not occupied by a revenue generating advertisement, and (ii) the advertisement is consistent with this policy.

~~Review by the General Manager.~~

The Board designates the CEO/General Manager to administer the Advertising Policy. This delegation ~~includess with the power of re-delegation by the CEO/General Manager to appropriate staff.~~ The CEO/General Manager or designee shall review all advertisement content and determine

whether it complies with this policy.

If the CEO/General Manager or designee determines that the advertisement does not comply with this policy, written notification of same specifying the standard(s) with which the advertisement does not comply and the appeal process shall be provided to the advertiser with a copy of this policy.

On an as needed basis, the CEO/General Manager may refer any controversial proposed ad content to the Board for approval or rejection with a majority vote.

The Board of Directors may, on its own action or at the request of an advertiser wishing to appeal the CEO/General Manger's determination of an advertisement in accordance with appeal procedures developed by the CEO/General Manager, override any decision by the CEO/General Manager on ad content with a majority vote. The Board's decision shall be final.

~~Sunline Transit Agency shall submit bus shelter ad content to the corresponding city, delegated to the City Manager, for approval. The cities have five business days to respond. Sunline Transit Agency will have ad content approval discretion, if the corresponding city fails to respond within the five day period.~~

~~The Board designates the General Manager to administer the Advertising Policy. This delegation is with the power of re-delegation to appropriate staff.~~

SunLine Transit Agency  
Advertising Policy  
Policy No: B-020598

Adopted: 01/28/98  
Revised: 06/25/25

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# ADVERTISING POLICY

## PURPOSE AND SCOPE

SunLine Transit Agency (STA), acting in a proprietary capacity, is engaged in the sale of advertisement space to earn revenue to supplement operating costs that are not otherwise met through farebox revenue and local, state and federal levies, taxes and grants.

This policy applies to the sale of all forms of advertising space in and upon STA's property and transit vehicles ("Transit Facilities"), including but not limited to: (1) advertising on the exterior of STA buses, (2) advertising on the interior of STA buses, and (3) advertising displayed on bus shelters in STA's service area.

By allowing limited types of advertising on the Transit Facilities, STA does not intend to create a public forum for political discourse or expressive activity, or to provide a forum for all types of advertisements. All advertising shall be subject to this uniform viewpoint neutral policy.

STA will not permit the types of advertising defined as Excluded Advertising in this policy. Excluded Advertising may not be displayed and, if displayed, will be removed by STA.

By not allowing Excluded Advertising, STA seeks to maintain a professional advertising environment that will maximize advertising revenue and minimize interference with or disruption to its transit system. STA further seeks to maintain an image of neutrality on political, religious and other issues that are not the subject of Commercial Advertising and are the subject of public debate and concern. Finally, STA's goal is to continue to build and retain ridership.

## EXCLUDED ADVERTISING

An advertisement cannot be displayed or maintained on Transit Facilities if information contained in the advertisement falls within one or more of the following categories of Excluded Advertising, as determined by SunLine, in its sole discretion:

1. Defamatory or likely to hold up to scorn or ridicule a person or group of persons.

2. Is false, misleading or deceptive.
3. Relates to or promotes any illegal activity.
4. Obscene or pornographic.
5. Depicts or promotes the sale of alcohol, cannabis, tobacco products, any illegal product, service, or entity, and/or firearms.
6. Depicts or advocates violence.
7. Demeans, degrades or has the effect of promoting discrimination against any group or individual on the basis of race, color, religion, national origin, age, sex, disability, ancestry or sexual orientation.
8. Constitutes a political or public issue defined as advertising that contains political speech referring to a particular ballot question, initiative, petition, referendum, candidate, political party, or viewpoint or expresses or advocates opinions or positions upon any of the foregoing or on a matter of public debate about economic, political, religious, or social issues. This prohibition includes any advertisement referring to or depicting a candidate for public office in any context.
9. Constitutes an unauthorized endorsement defined as advertising that implies or declares that STA endorses a product, service, viewpoint, event or program. This definition does not include advertising for a service, event or program for which STA is an official sponsor, co-sponsor or participant.
10. Constitutes a religious advertisement defined as advertising that contains direct or indirect reference to religion, or to a deity or deities, or which includes the existence, non-existence or other characteristics of any deity or deities, or to any religious creed, denomination, belief, tenet, cause or issue relating to (including opposing or questioning) any religion. This includes the depiction of text, symbols, or images commonly associated with any religion or with any deity or deities, or any religious creed, denomination, belief, tenet, cause or issue relating to (including opposing or questioning) any religion.

## **PERMITTED ADVERTISING**

In permitting limited advertising, STA seeks only to supplement fare revenue and other income that funds its operations and to promote its services. To realize the maximum benefit from the sale of advertising space, all advertising must be managed in a manner that will generate as much revenue as practicable while ensuring that the advertising does not discourage use of the system, does not diminish STA's reputation in the communities it serves, and is consistent with the goal of providing safe and efficient public transportation. To attain these objectives, STA will only allow advertising on its Transit Facilities that do not qualify as Excluded Advertising, as

defined above ("Permitted Advertising"). Permitted Advertising includes:

1. Commercial Advertising, defined as advertising for the sole purpose of promoting or soliciting the sale, rental, or distribution of products, goods, services, entertainment, events, programs, or real or personal property for commercial purposes. It does not include advertising that also conveys content that constitutes Excluded Advertising under this policy.
2. Advertising that promotes STA and its services.
3. Public Service Advertising, defined as advertising proposed by either a governmental entity, academic institution or tax-exempt nonprofit organization that relates to: community, art, culture, education/training, health, provision of children and family services, provision of services and programs that provide support to low income citizens, senior citizens and people with disabilities, or safety or special events, programs and/or messages and does not include or contain any content that constitutes Excluded Advertising. Upon STA's request, nonprofit entities must document their tax-exempt status. Unless the source of the Public Service Advertising is obvious from the content or copy, the advertisement must specifically identify the sponsor of the advertisement or the message.
4. Cross-Promotional Advertising, defined as advertising in which STA collaborates with for-profit or non-profit entities to promote using STA as a conveyance to a specific event; such advertising may not contain any content that constitutes Excluded Advertising.

### **ADMINISTRATION AND ENFORCEMENT OF POLICY**

Advertisers must pay the applicable fee for the advertising space before the advertisement is installed. STA may, by mutual agreement with a city within its service area, waive this fee for a city wishing to advertise city sponsored events, city programs, or city agencies on a STA bus shelter located within the city's jurisdiction so long as (i) the bus shelter advertising space is not occupied by a revenue generating advertisement, and (ii) the advertisement is consistent with this policy.

The Board designates the CEO/General Manager to administer the Advertising Policy. This delegation includes the power of re-delegation by the CEO/General Manager to appropriate staff. The CEO/General Manager or designee shall review all advertisement content and determine whether it complies with this policy.

If the CEO/General Manager or designee determines that the advertisement does not comply with this policy, written notification of same specifying the standard(s) with which the advertisement does not comply and the appeal process shall be provided to the advertiser with a copy of this policy.

On an as needed basis, the CEO/General Manager may refer any controversial proposed ad content to the Board for approval or rejection with a majority vote.

The Board of Directors may, on its own action or at the request of an advertiser wishing to appeal the CEO/General Manger's determination of an advertisement in accordance with appeal procedures developed by the CEO/General Manager, override any decision by the CEO/General Manager on ad content with a majority vote. The Board's decision shall be final.

## SunLine Transit Agency

**DATE:** June 25, 2025 **ACTION**

**TO:** Strategic Planning & Operational Committee  
Board of Directors

**FROM:** Paul Mattern, Chief Planning Officer

**RE:** Adoption of Fiscal Year 2026-2028 Short Range Transit Plan

---

### **Recommendation**

Recommend that the Board of Directors (Board) adopt the Fiscal Year (FY) 2026–2028 Short Range Transit Plan (SRTP), which outlines SunLine Transit Agency’s (SunLine) strategic priorities, planned service adjustments, performance benchmarks, and capital improvements over the next three fiscal years.

### **Background**

The SRTP, developed annually, describes SunLine’s operating and capital plans and funding sources for the upcoming three fiscal years. The SRTP is prepared according to the Riverside County Transportation Commission (RCTC) requirements and guidelines, the California Public Utilities Code, and California Transportation Development Act.

Key highlights from the attached FY26-28 SRTP include:

- 1) Implement fixed route services north of I-10 in FY 26.
- 2) Conduct a Comprehensive Operational Analysis (COA) that will inform future network changes to better serve our community.
- 3) Complete a microtransit service planning study.
- 4) Complete the public facing hydrogen station at Thousand Palms.
- 5) Complete the Architecture and Engineering (A&E) work for key projects including: the Workforce Training Center, a new Maintenance facility, a new Facilities Department building, and the SunLine micro-grid.

The service and capital plans recommended in the SRTP align with the FY26 budget, which has been submitted separately to the Board for consideration.

### **Financial Impact**

The operating and capital costs have been introduced in the FY26 budget.

**Performance Goal**

**Goal 2: Highly Trusted Mobility Solutions** – Strive to deliver highly accessible, convenient and trusted mobility solutions that effectively meet the diverse needs of Coachella Valley Citizens and improve their connectivity to daily life needs.

**Goal 3: Organizational Health & Resiliency** – Optimize SunLine’s fiscal and overall organizational strength to allow for growth and to better withstand unexpected challenges (e.g., COVID-19 financial impact).

**In Collaboration with:**

Luis Garcia, Chief Financial Officer

Edith Hernandez, Director of Board and Legislative Affairs

**Approved/Reviewed by:**

Mona Babauta, CEO/General Manager

Catherine J. Groves, General Counsel

Attachments:

- [Item 13a](#) – FY26-28 SRTP Presentation
- [Item 13b](#) – FY26-28 SRTP

# **FY 26-28 Short Range Transit Plan (SRTTP)**

**Presented by: Paul Mattern, Chief Planning Officer**

**June 25, 2025**



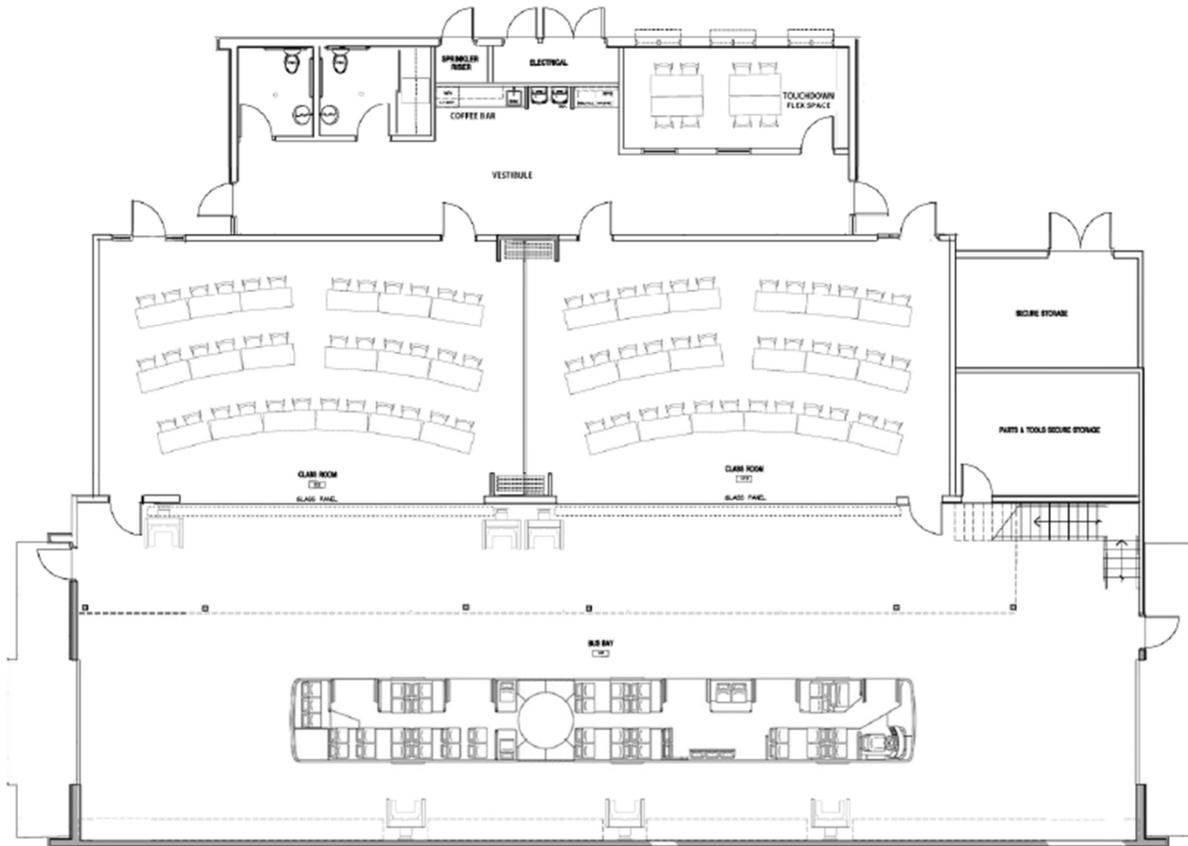
- Fiscal years 2026 to 2028
- Riverside County Transportation Commission (RCTC), California Public Utilities Code and California Transportation Development Act
- Must accompany a balanced budget
- RCTC Board approval of Countywide SRTP

Effective January 7, 2024

		Weekday	Saturday	Sunday
1WV	Palm Desert Mall - Palm Springs	30	30	30
1EV	Coachella - Palm Desert Mall	30	30	30
2	Desert Hot Springs - Palm Springs - Cathedral City	30	30	30
3	Desert Edge - Desert Hot Springs	30	60	60
4	Palm Desert Mall - Palm Springs	60	60	60
5	Desert Hot Springs - CSUSB Palm Desert -Palm Desert Mall	60	NS	NS
6	Coachella - Via Fred Waring - Palm Desert Mall	60	NS	NS
7	Bermuda Dunes - Indian Wells - La Quinta	45	90	90
8	North Indio - Coachella - Thermal/Mecca	60	60	60
9	North Shore - Mecca - Oasis	60	60	60
10	Indio - CSUSB-PDC - CSUSB - San Bernardino Transit Center (SBTC)/Metrolink	4 round trips	NS	NS

NS: No Service

- Changes proposed in the short term:
  - Implement transit service north of I-10.
  - Conduct Comprehensive Operational Analysis (COA) that will inform future network changes to better serve our community.
- SunRide service planning study.



- Public Facing Hydrogen Station
- A&E for Workforce Training Center
- A&E for Maintenance Facility Building
- A&E for a Facilities Building
- A&E for a micro-grid





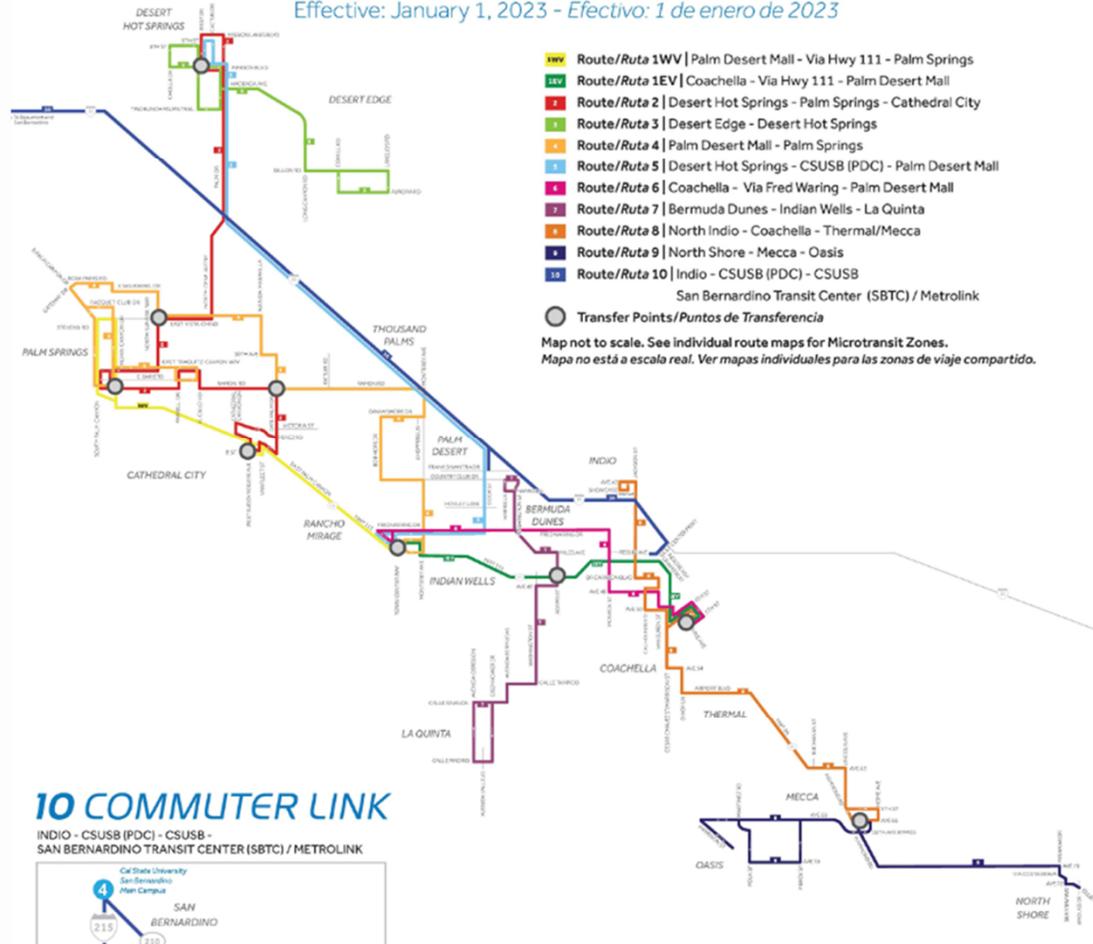
- Strengthen relationships with peer PIOs to promote the SunLine brand.
- Increase social media activity to connect with, promote, and interact with community members.
- Participate in community events such as parades or community awareness events.

City/District	Total Stops	Total Shelters		Stops with 10+ boardings		Stops with Shelters and 10+ boardings		Shelters needed to reach policy compliance <sup>1</sup>		# of shelters exceeding current policy <sup>1</sup>
		Count	Percent	Count	Percent	Count	Percent	Count	Percent	
Cathedral City	61	52	85%	19	31%	19	100%	0	0%	33
Coachella	34	31	91%	8	24%	8	100%	0	0%	23
Desert Hot Springs	48	36	75%	17	35%	16	94%	1	10%	20
Indian Wells	15	13	87%	0	0%	0	0%	0	0%	13
Indio	87	59	68%	25	29%	24	96%	1	10%	35
La Quinta	52	36	69%	12	23%	12	100%	0	0%	24
Palm Desert	52	42	81%	17	33%	17	100%	0	0%	25
Palm Springs	121	92	76%	41	34%	35	85%	6	60%	57
Rancho Mirage	33	25	76%	2	6%	2	100%	0	0%	23
Riverside County uninc.	68	28	41%	6	9%	4	67%	2	20%	24
<i>Thermal</i>	8	2	25%	0	0%	0	0%	0	0%	2
<i>Oasis</i>	10	3	30%	0	0%	0	0%	0	0%	3
<i>Mecca</i>	17	8	47%	2	12%	2	100%	0	0%	6
<i>One Hundred Palms</i>	3	2	67%	2	67%	2	100%	0	0%	0
<i>Thousand Palms</i>	9	9	100%	0	0%	0	0.00%	0	0%	9
<i>North Shore</i>	11	1	9%	0	0%	0	N/A	0	0%	1
<i>Desert Edge</i>	7	0	0%	2	29%	0	0%	2	20%	0
<i>Bermuda Dunes</i>	3	3	100%	0	0%	0	N/A	0	0%	3
<b>Total</b>	<b>571</b>	<b>414</b>	<b>73%</b>	<b>147</b>	<b>26%</b>	<b>137</b>	<b>93%</b>	<b>10</b>	<b>100%</b>	<b>277</b>

- Ten (10) or more boardings per day warrant a shelter.
- Ten (10) current stops meet threshold but lack shelters.

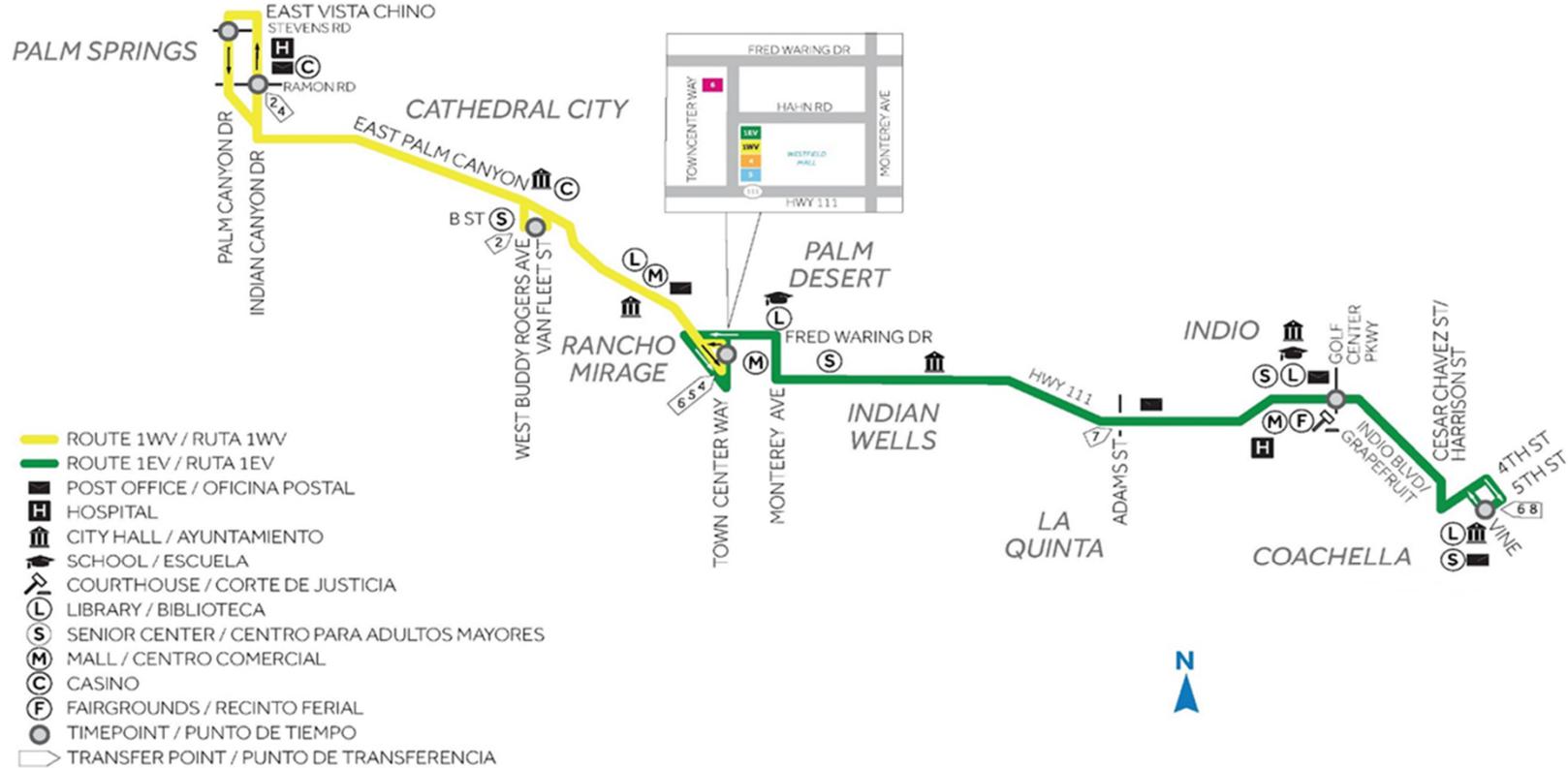
## SYSTEM MAP - MAPA DEL SISTEMA

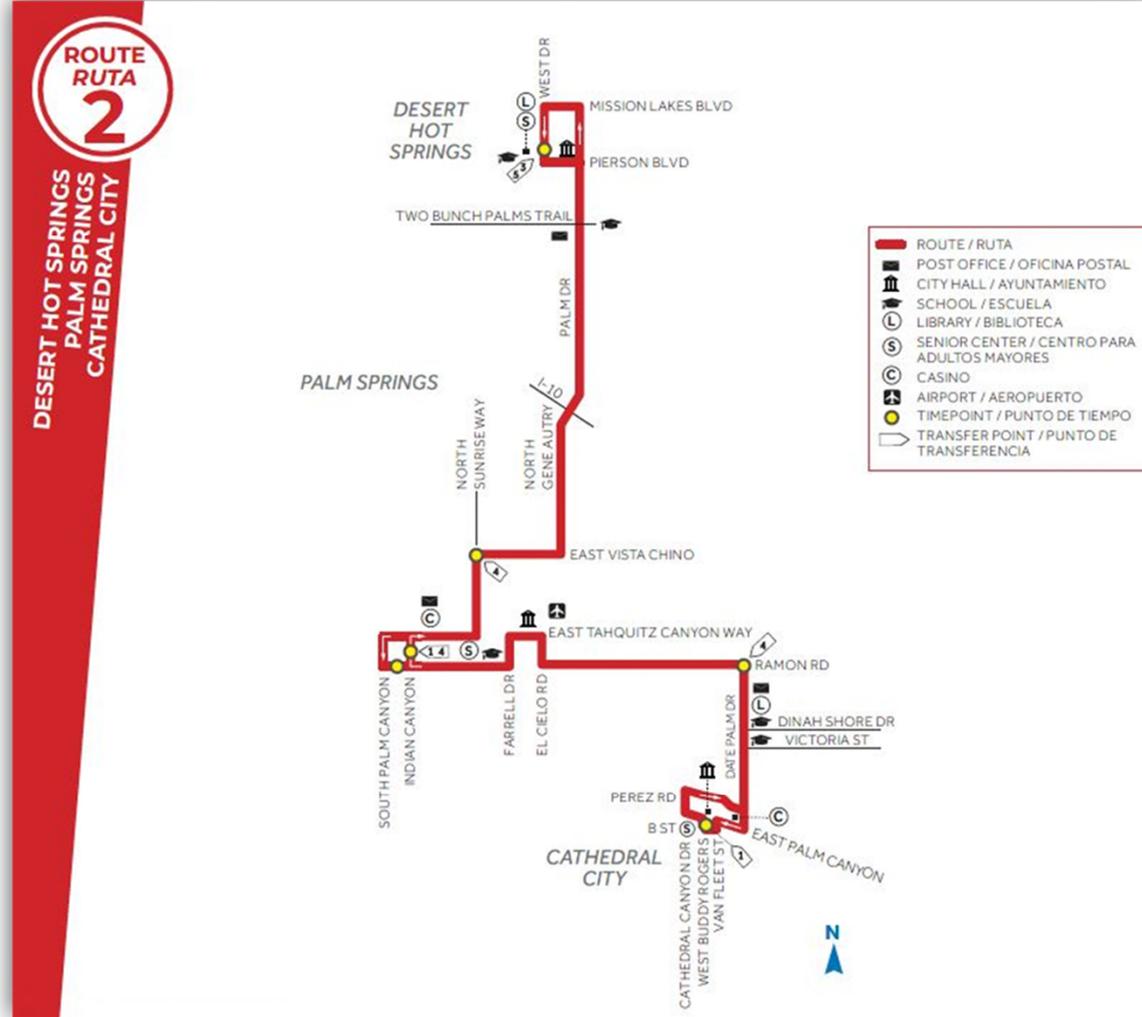
Effective: January 1, 2023 - Efectivo: 1 de enero de 2023



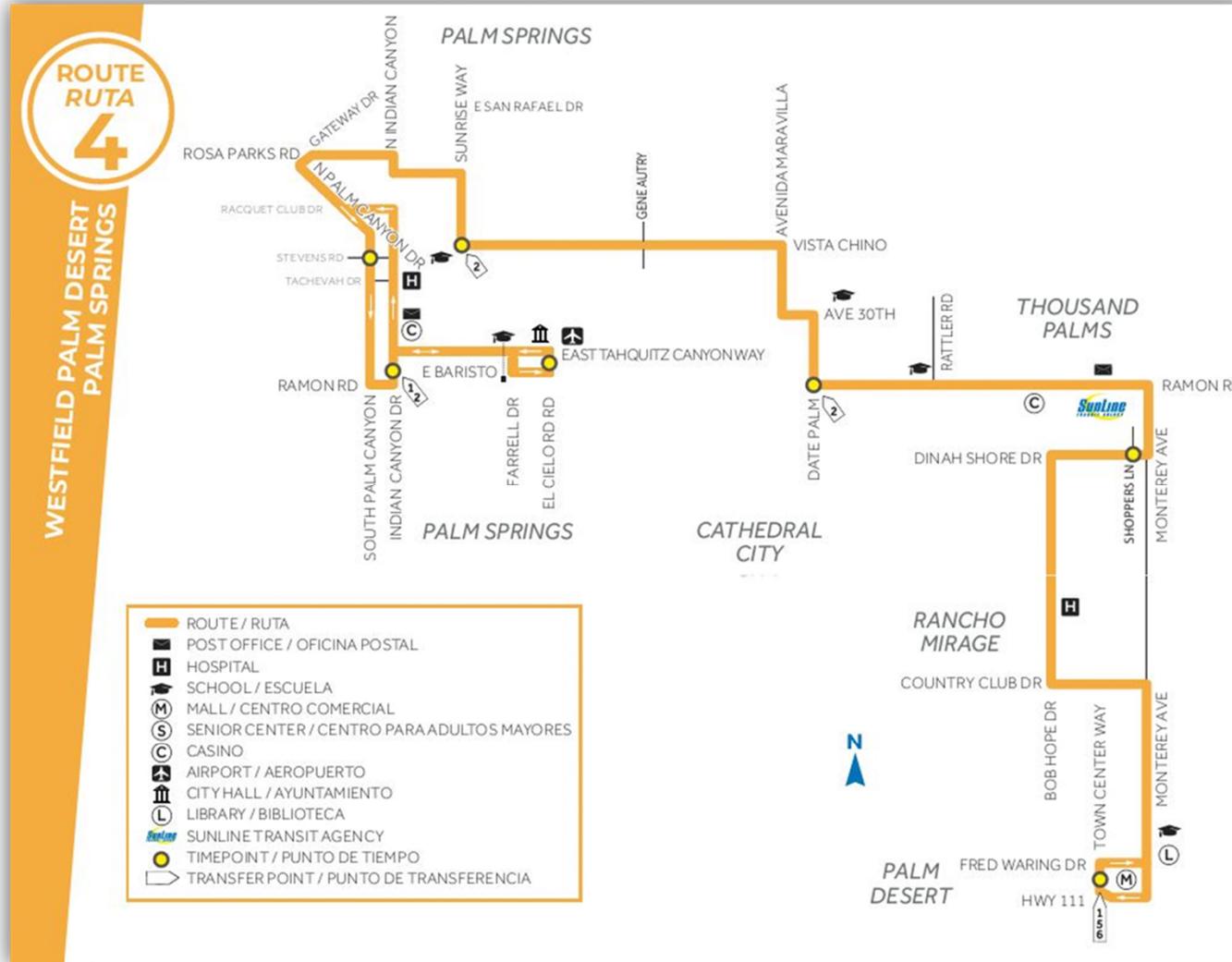
**Route 1 West Valley (WV)**  
1WV Palm Springs - 1WV Palm Desert Mall

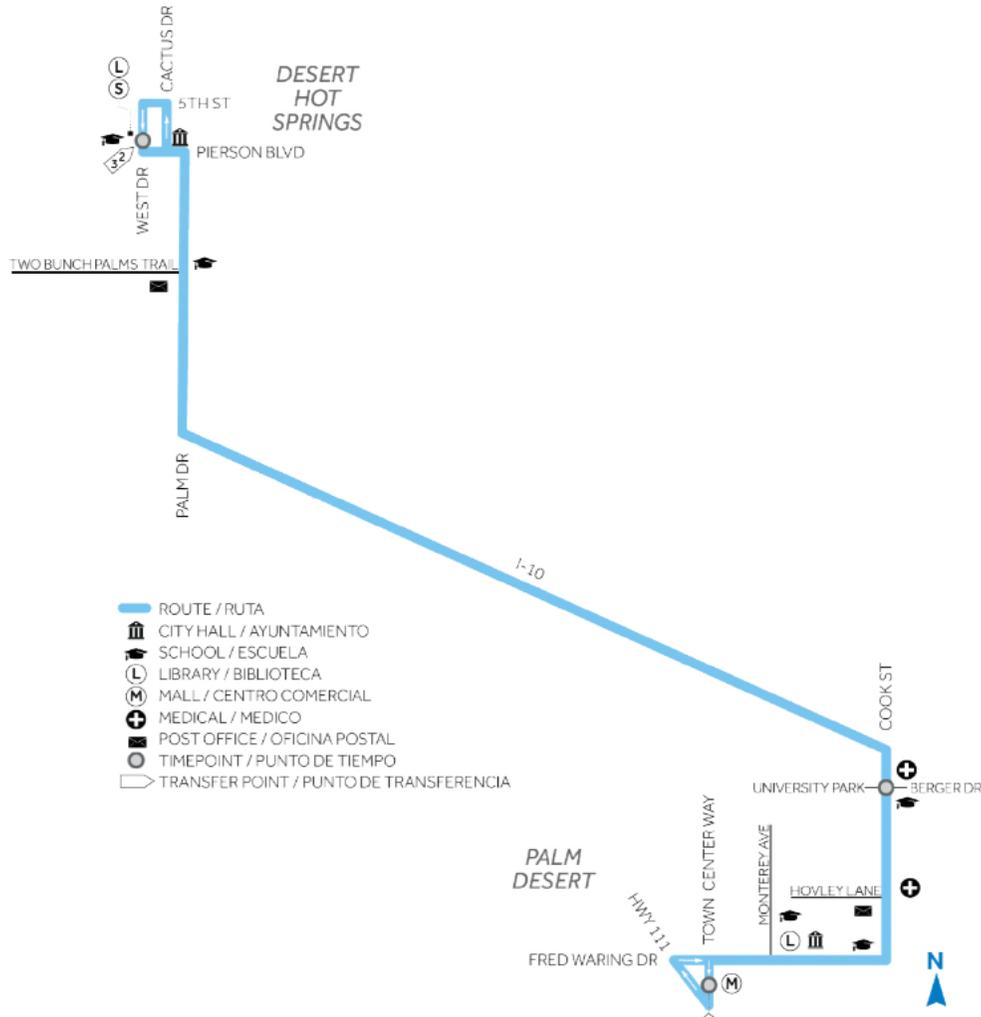
**Route 1 East Valley (EV)**  
1EV Palm Desert Mall - 1EV Coachella



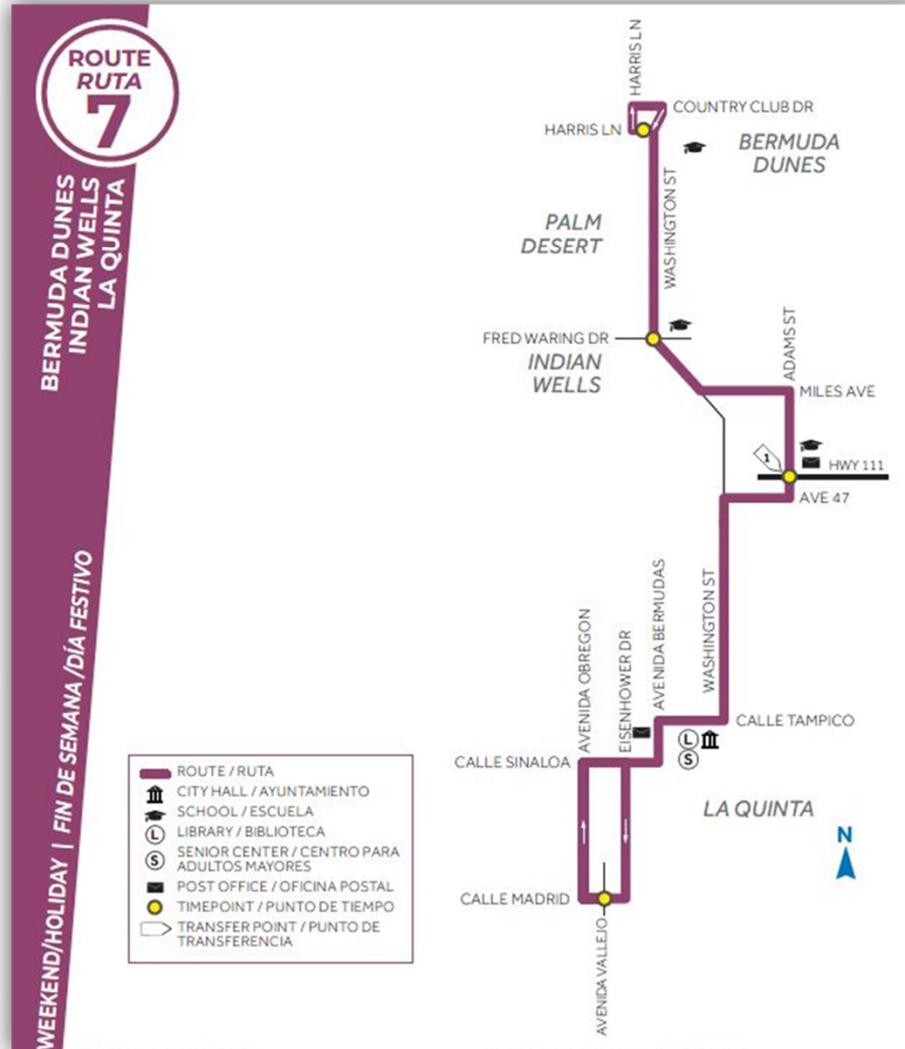


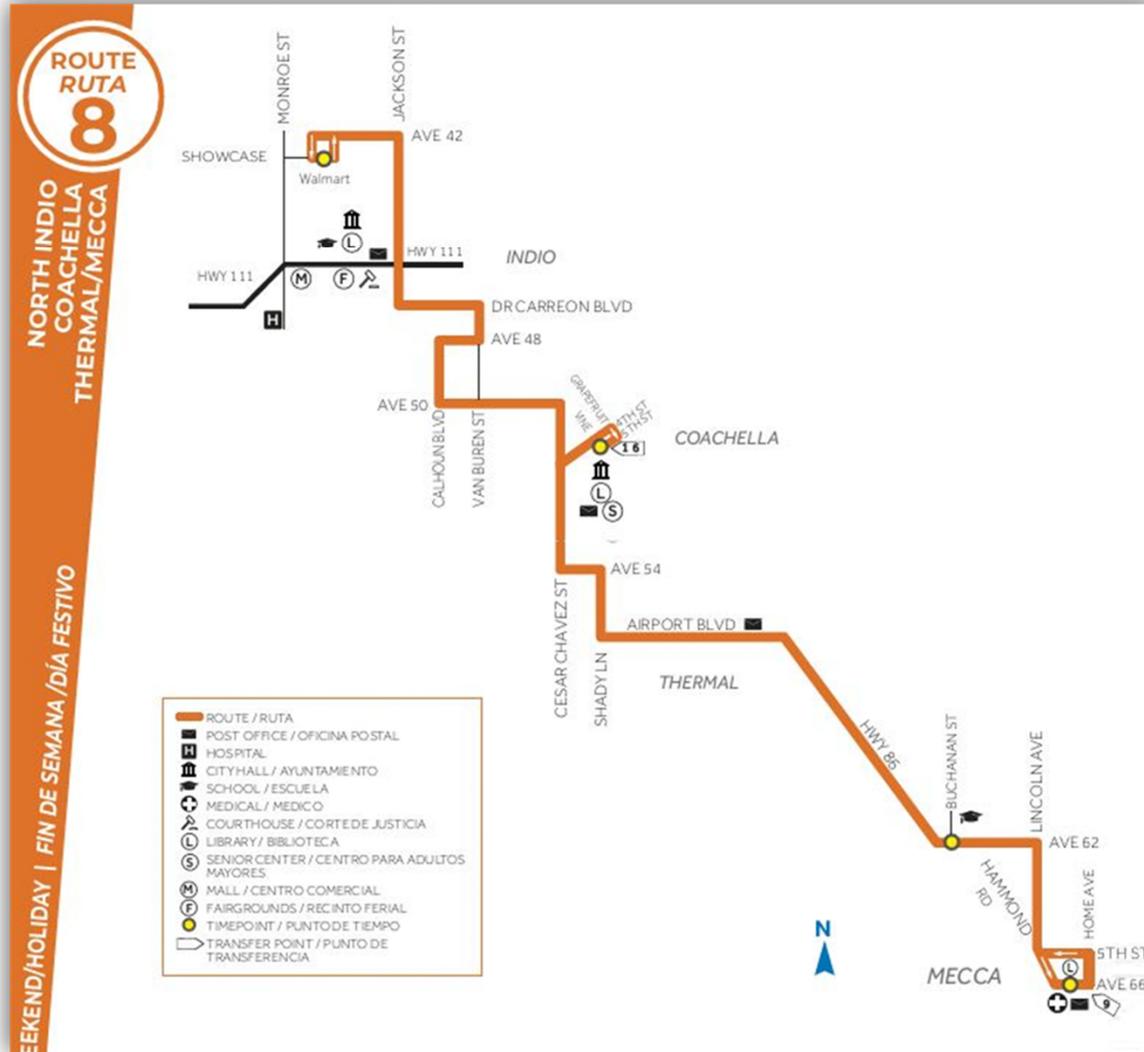


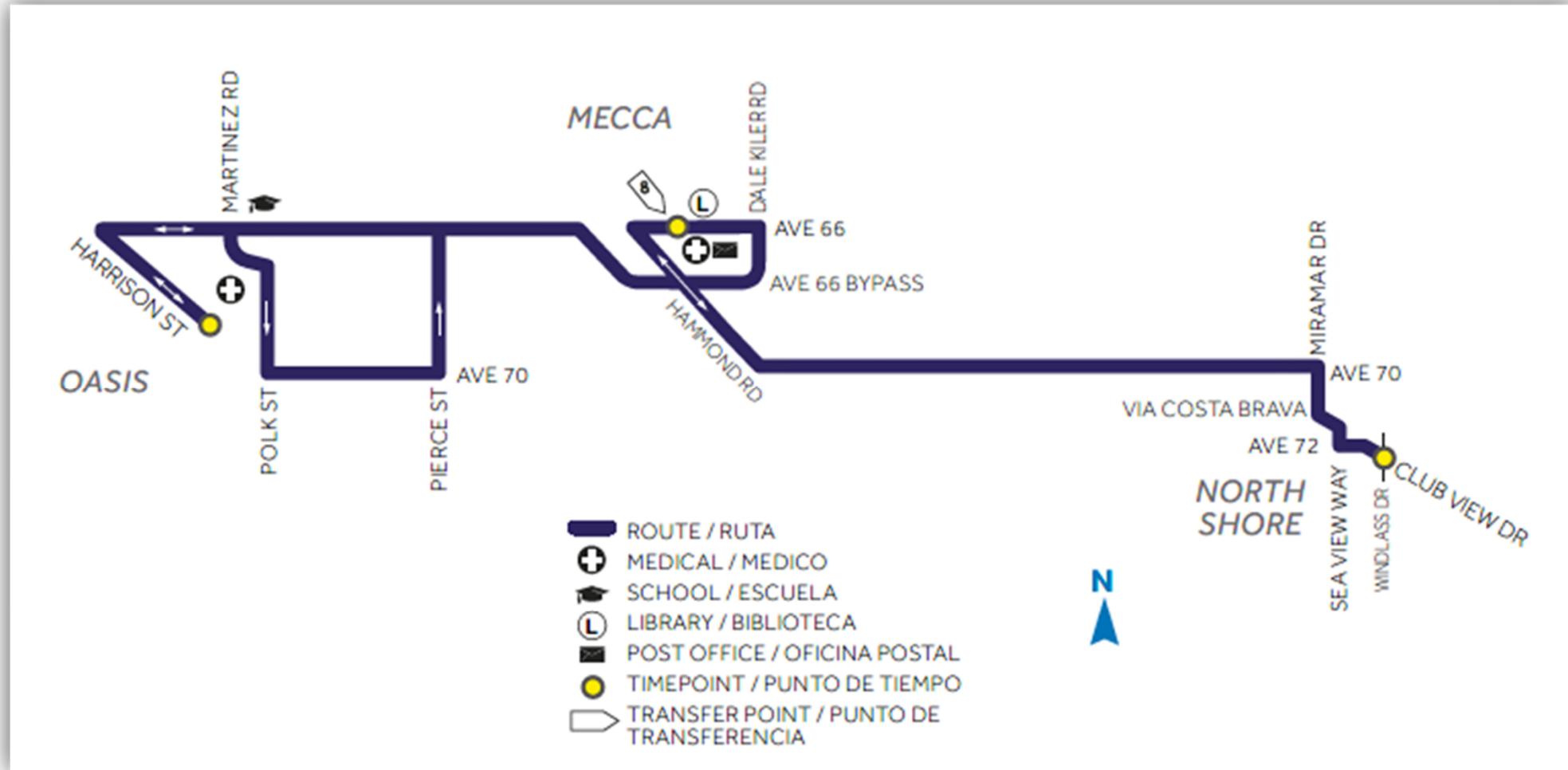


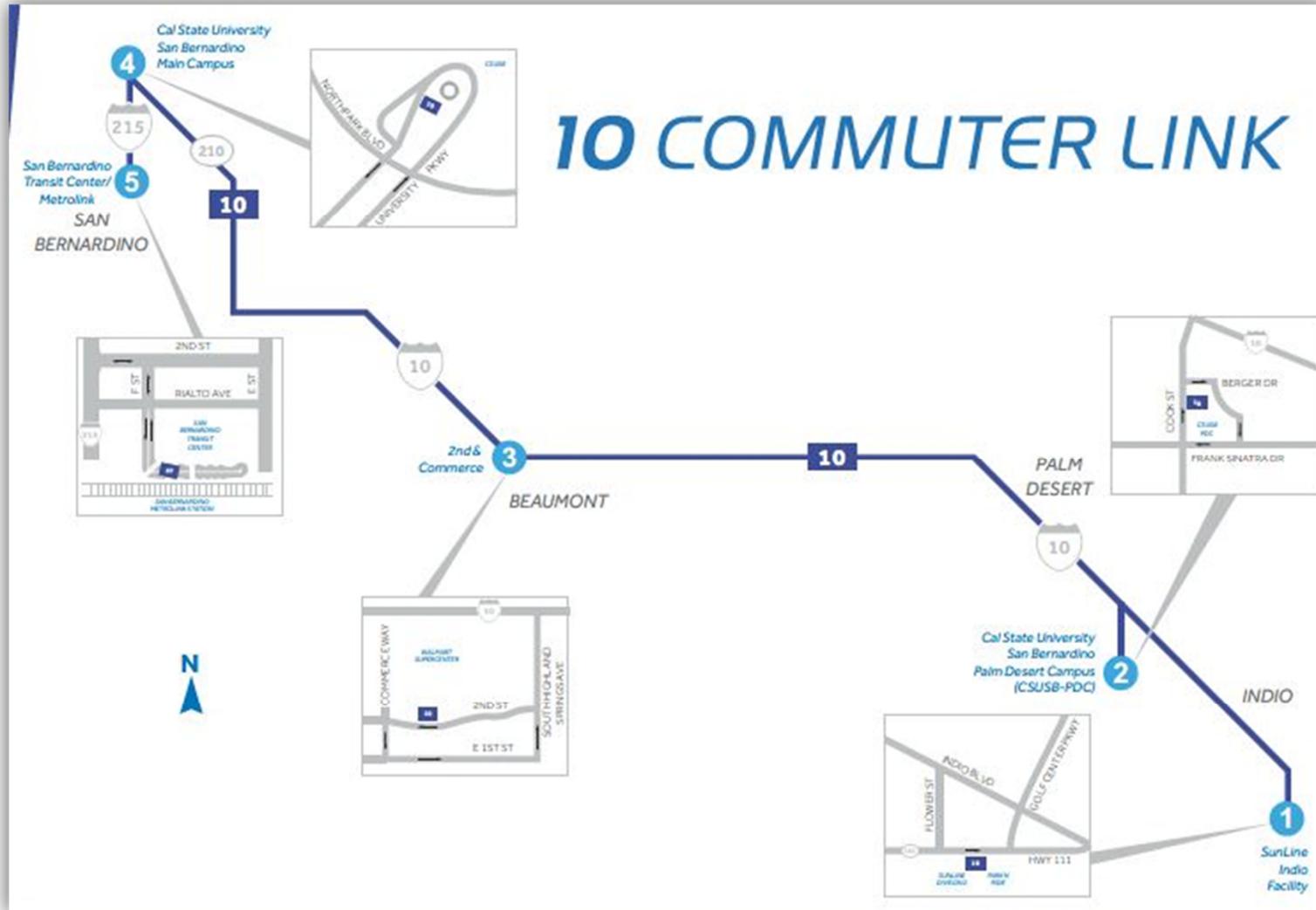












# Questions?



FY26-28

# SHORT-RANGE TRANSIT PLAN



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FY26-28 SHORT-RANGE  
TRANSIT PLAN

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## BOARD OF DIRECTORS

SunLine Transit Agency (STA) was formed as a Joint Powers Authority (JPA) on July 1, 1977, through an agreement between Riverside County and the cities of Coachella, Desert Hot Springs, Indio, Palm Desert, and Palm Springs. The JPA was later expanded to include Cathedral City, Indian Wells, La Quinta, and Rancho Mirage. SunLine is governed by a Board of Directors, consisting of one elected official from each member city and one Riverside County supervisor. STA's Governing Board is responsible for overseeing the agency's policies, budget, and strategic direction.

<b>CATHEDRAL CITY</b>	Nancy Ross, Chair
<b>COACHELLA</b>	Denise Delgado
<b>DESERT HOT SPRINGS</b>	Daniel Pitts
<b>INDIAN WELLS</b>	Bruce Whitman
<b>INDIO</b>	Glenn Miller
<b>LA QUINTA</b>	John Peña
<b>PALM DESERT</b>	Jan Harnik
<b>PALM SPRINGS</b>	Grace Garner
<b>RANCHO MIRAGE</b>	Lynn Mallotto, Vice-Chair
<b>RIVERSIDE COUNTY</b>	V. Manuel Perez



# SunLine Board of Directors Effective January 2025



Nancy Ross  
Chair  
Cathedral City



Lynn Mallotto  
Vice-Chair  
Rancho Mirage



Daniel Pitts  
Desert Hot Springs



Grace Garner  
Palm Springs



Jan Harnik  
Palm Desert



Bruce Whitman  
Indian Wells



John Peña  
La Quinta



Glenn Miller  
Indio



Denise Delgado  
Coachella



V. Manuel Perez  
Riverside County

## ORGANIZATIONAL STRUCTURE

SunLine's CEO/General Manager implements the Board of Directors' policy direction and provides strategic and operational leadership to the organization. The Executive Team supports the CEO/General Manager by supporting and developing STA staff, overseeing day-to-day business operations, and leading the implementation of Agency initiatives.

<b>CHIEF EXECUTIVE OFFICER/GENERAL MANAGER</b>	Mona Babauta
<b>CHIEF FINANCIAL OFFICER</b>	Luis Garcia
<b>CHIEF SAFETY OFFICER</b>	Bryan Valenzuela
<b>CHIEF OF HUMAN RELATIONS</b>	Tamara Miles
<b>CHIEF TRANSPORTATION OFFICER</b>	Isabel Vizcarra
<b>CHIEF PLANNING OFFICER</b>	Paul Mattern
<b>CHIEF MAINTENANCE OFFICER</b>	Mark Perry
<b>CHIEF OF CAPITAL PROJECTS</b>	Walter Watcher

Figure 1-2 Sunline Executive Team



The graphic features a blue background with a white SunLine logo in the top left. The title "SunLine Executive Team" is centered in white. Below the title, seven circular headshots of executives are arranged in a grid. Each headshot is accompanied by the executive's name and title in white text.

 **SunLine**  
Executive Team

  
Mona Babauta  
CEO/General  
Manager

  
Luis Garcia  
Chief Financial  
Officer

  
Isabel Vizcarra  
Chief Transportation  
Officer

  
Tamara Miles  
Chief of Human  
Relations

  
Bryan Valenzuela  
Chief Safety  
Officer

  
Walter Watcher  
Chief of Capital  
Projects

  
Paul Mattern  
Chief Planning  
Officer

# CHAPTER 1

## System Overview & Service Profile



FY26-28 SHORT-RANGE  
**TRANSIT PLAN**

## 1.1 Description of Service Area

SunLine Transit Agency serves the eastern portion of Riverside County known as the Coachella Valley, extending from the San Geronio Pass in the west to the Salton Sea in the southeast. The Coachella Valley is located 120 miles east of downtown Los Angeles and 60 miles east of Riverside and San Bernardino. SunLine Transit Agency services a mix of 9 cities and 7 unincorporated urban, suburban and rural communities. It covers an area of approximately 1650 square miles and includes several cities and unincorporated regions.



**Geographic Size** 1,120 square miles



**Fixed Route Service Coverage** 150 square miles



**Paratransit Service Coverage** 200 square miles<sup>1</sup>



**9 JPA Member Cities** SunLine provides service to Cathedral City, Coachella, Desert Hot Springs, Indian Wells, Indio, La Quinta, Palm Desert, Palm Springs, and Rancho Mirage

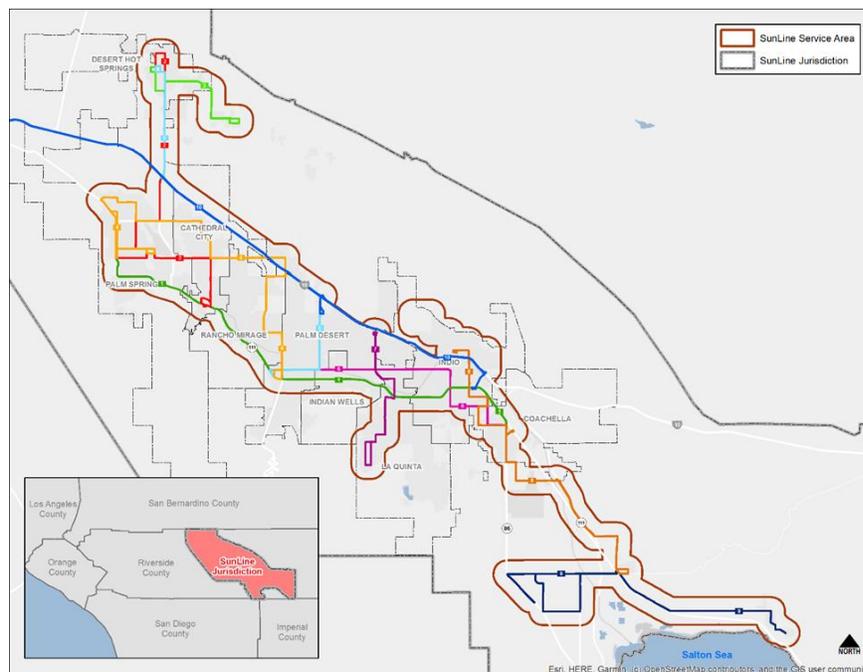


**Unincorporated Communities** SunLine provides service to the unincorporated county areas of Bermuda Dunes, Desert Edge, Mecca, North Shore, Oasis, Thermal, and Thousand Palms



**Commuter Service** Commuter express service is provided outside of the service area connecting the Coachella Valley to San Bernardino

**Figure 1-3 Sunline Service Area**



<sup>1</sup> The Federal Transit Administration describes the service area as a measure of access to transit service in terms of population served and area covered. The service area is determined using the Americans with Disabilities Act of 1990 (ADA) to identify the corridor surrounding routes three-quarters of mile on either 2023.

## 1.2 Population Profile and Demographics

The Coachella Valley is home to a diverse population with a mix of urban, suburban, and rural communities. The population of the Coachella Valley is estimated to be around 411,000 residents, with significant seasonal fluctuations due to tourism and “snowbirds” visits. The area is known for its large retiree population, as well as a mix of working families, students, and service industry workers. Here's an overview of the population profile:

### 1.2.1 General Coachella Valley Population Overview

**Total Population:** Approximately 411,000 residents

**Population Density:** Approximately 646 people per square mile

**Median Age:** The median age in the Coachella Valley is 44.92 years

**Main Economic Drivers:** Tourism, agriculture, hospitality, and retail

**Median Household Income:** \$76,666

**Poverty Rate:** Approximately 13% of the population lives below the poverty line

**Primary Language:** English; Spanish in Hispanic populations

### 1.2.2 Key demographics of the Coachella Valley population

- **Older Adults and Retirees:** Many retirees live in the Coachella Valley, particularly in cities like Palm Springs, which has a higher median age compared to other parts of California. This demographic relies heavily on accessible and convenient transit options.
- **Low-Income Families & Agricultural Workers:** The region is home to a significant number of low-income households and agricultural workers, particularly in areas like Mecca, Thermal, and Coachella, where transportation options are essential for access to employment, education, and healthcare.
- **Tourism & Visitors:** The area also serves tourists, with SunLine providing services to popular destinations, resorts, and entertainment venues, contributing to the region's tourism infrastructure.
- **Seasonal Residents:** The valley sees a large influx of tourists and seasonal residents, particularly in the winter months, drawn by the area's warm climate and leisure activities.

**Figure 1-4** Sunline Service Area Socioeconomic Profile

Geography	Total Population	Median Age	Median Income	Households		Population with a Disability		Population Below Poverty Level		Zero Auto Households	
				# of Households	Average Household Size						
<b>SunLine Jurisdiction</b>	<b>410,846</b>	<b>44.92</b>	<b>76,666.35</b>	<b>162,005</b>	<b>2.51</b>	<b>53476</b>	<b>13%</b>	<b>52,234</b>	<b>13%</b>	<b>7,880</b>	<b>5%</b>
Bermuda Dunes CDP	8,047	39.4	93,819	3,075	2.62	722	8.9%	709	9.1	145	4.7%
Cathedral City	52,047	40.9	67,031	19,157	2.69	6,294	12.%	7,938	15.3	1,054	5.5%
Coachella City	42,594	33.4	67,558	12,352	3.45	3,708	8.7%	4,481	10.6	447	3.9%
Desert Edge CDP	3,642	63.7	40,089	1,970	1.85	683	18.1%	631	17.3	150	7.6%
Desert Hot Springs	32,786	34.4	50,349	11,432	2.85	4,214	12.9%	6,287	19.2	996	8.7%
Indian Wells	4,830	67.5	145,313	2,457	1.96	727	15.1%	189	3.9	65	2.6%
Indio	90,669	38.2	78,709	31,027	2.89	10,584	11.8%	10,417	11.6	1,033	3.3%
La Quinta	38,299	52.1	97,628	15,733	2.43	4,178	10.9%	3,462	9.1	556	3.5%
Mecca CDP	7,071	33.2	45,011	2,177	3.25	932	13.2%	1,351	19.3	274	12.6%
North Shore CDP	3,373	30.7	43,208	964	3.50	99	2.9%	120	3.6	0	0%
Oasis CDP	4,455	25.7	36,553	1,193	3.68	365	8.2%	1,669	37.5	16	1.3%
Palm Desert	51,551	56.7	79,508	24,145	2.11	8,461	16.6%	5,785	11.3	968	4.0%
Palm Springs	44,998	57.8	71,979	24,297	1.82	7,799	17.5%	6,093	13.7	1,670	6.9%
Rancho Mirage	17,375	65.0	109,943	8,686	1.97	3,142	18.3%	1,876	10.9	338	3.9%
Thermal CDP	1,420	37.0	-	640	2.20	305	21.5%	427	30.1	28	4.4%
Thousand Palms CDP	7,662	37.3	80,280	2,700	2.81	1,263	16.5%	779	10.4	110	4.1%

Source: 2023 American Community Survey 5-Year Estimates Data Profile

### 1.2.3 Key demographics of SunLine ridership

To delve deeper into the transportation needs of this specific population, SunLine conducted an Onboard Rider Survey in 2019. This survey provided valuable insights into its fixed-route ridership, helping to understand who was riding the bus, where they were going, and why. The findings showed that:

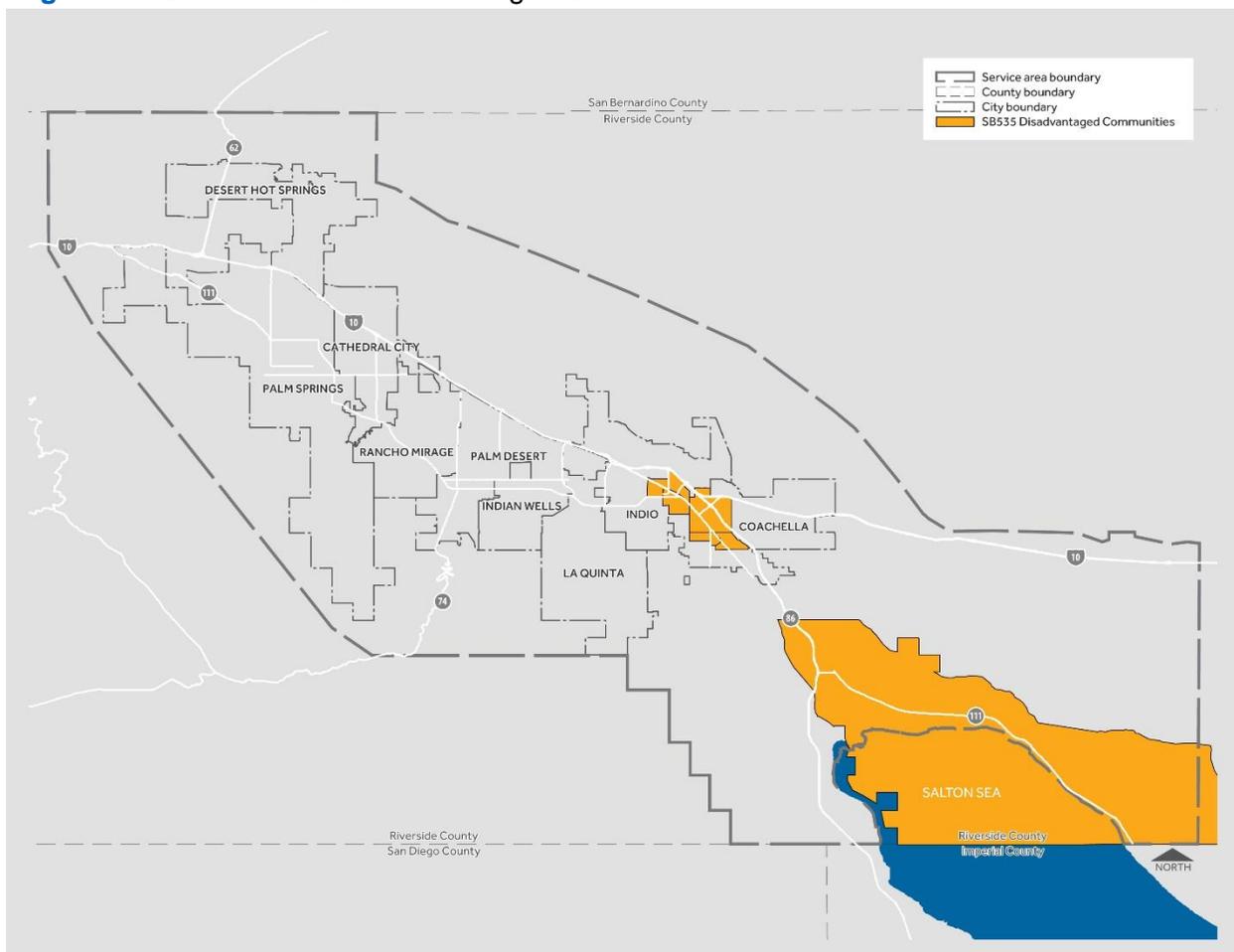
- **Transit Users:** Approximately 85% of riders are classified as frequent riders due to limited access to a vehicle, a valid driver's license, or the ability to drive.
- **Age:** Two-thirds (66%) of riders are under 45 years old, with one-third (33%) under 25.
- **Employment:** 51% of riders are employed, 24% of which are full-time and 27% are part-time.
- **Racial Identity:** Racial demographics include 48% Latino, 28% White, and 14% African American.
- **Languages:** While 56% of riders speak English at home, 44% speak another language, primarily Spanish. Other languages spoken include French, Tagalog, Portuguese, and Vietnamese. Of bilingual riders, 61% report speaking English "very well," and 24% "well."
- **Income and Household:** The mean household size is 3.2 persons. 90% of riders have an annual income of less than \$50,000, with 60% earning less than \$25,000.
- **Use Frequency:** 49% of riders have ridden SunLine for two years or less (primarily students). Riders over 60 are more likely to have used SunLine for five years or more.
- **Trip Purpose:** 85% of trips originate or end at a rider's residence. Common trip purposes include travel to work, school, and personal business. Recreation and shopping are the least frequent trip purposes.

## 1.2.4 Disadvantaged Communities

SunLine Transit Agency provides service to areas identified as SB 535 Disadvantage Communities and/or Areas of Persistent Poverty. Disadvantaged communities in California are specifically targeted for investment of proceeds from the state’s cap-and-trade program. Senate Bill 535 mandates that 25 percent of the proceeds from the Greenhouse Gas Reduction Fund go to projects that benefit disadvantaged communities. These investments are primarily aimed at improving public health, quality of life, and economic opportunity in the state’s most burdened communities while also reducing pollution.

Disadvantaged communities are defined as the top 25 percent-scoring census tracts from the California Environmental Health Screening Tool (CalEnviroScreen). The Senate Bill 535 disadvantaged communities within the SunLine service area are illustrated in Figure 1-5.

**Figure 1-5** Senate Bill 535 Disadvantaged Communities

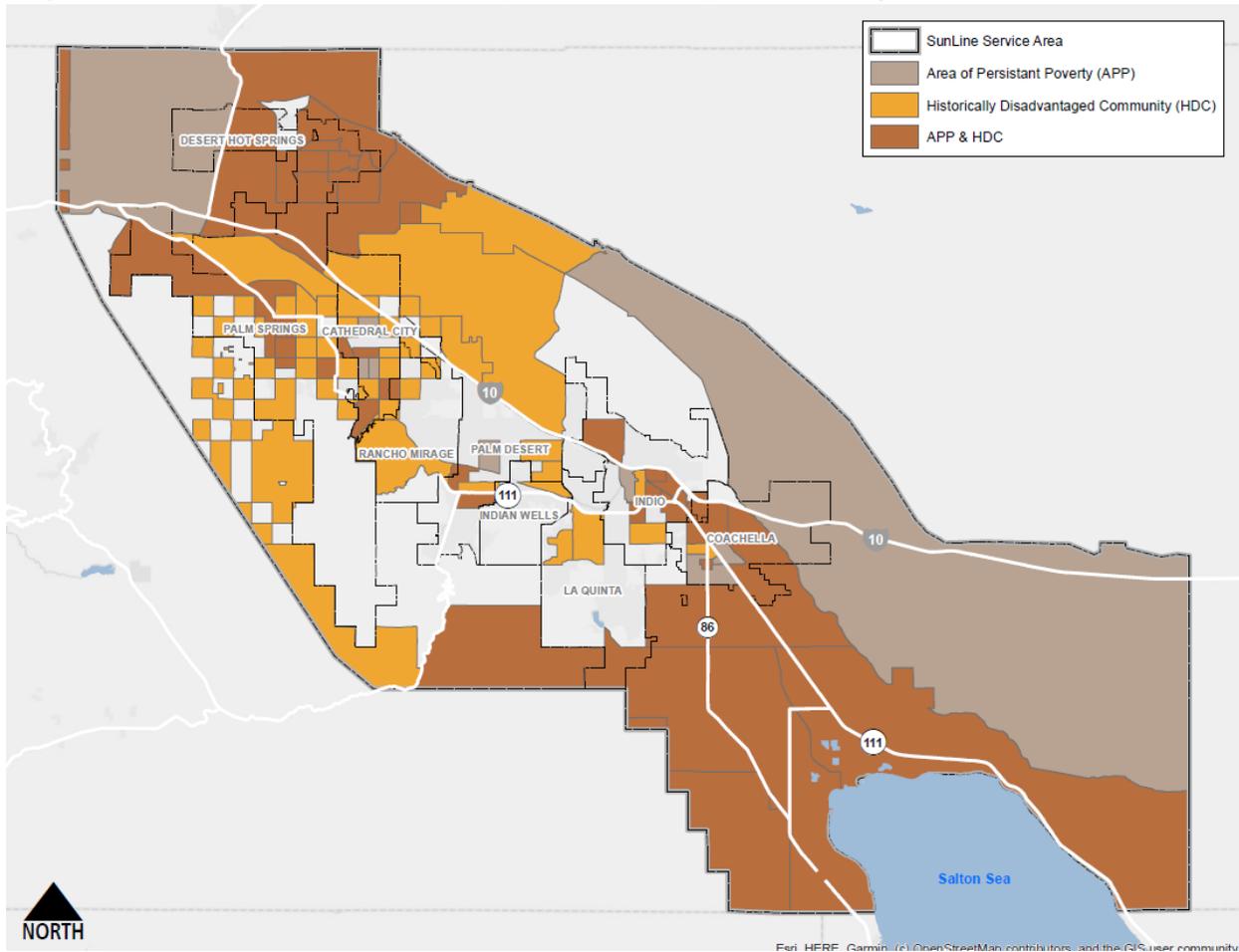


Source: California Environmental Protection Agency (CalEPA), 2022,

<https://experience.arcgis.com/experience/1c21c53da8de48f1b946f3402fbae55c/page/SB-535-Disadvantaged-Communities/>

Several federal funding programs specifically target investment toward areas designated as Areas of Persistent Poverty or Historically Disadvantaged Communities. Areas of Persistent Poverty include census tracts with poverty rates of 20 percent or higher based on the 2014 to 2018 5-year American Community Survey, counties that have had poverty rates of 20 percent or higher in the 1900 and 2000 Decennial Censuses and the 2020 Small Area Income Poverty Estimates, and territories or possessions of the United States. Historically Disadvantaged Communities include census tracts identified based on eight factors of socioeconomic disadvantage, tribal lands, and territories or possessions of the United States. Areas with these designations within the SunLine service area are shown Figure 1-6.

**Figure 1-6** Areas of Persistent Poverty and Historically Disadvantaged Communities



Source: U.S. Department of Transportation (US DOT), 2023

### 1.3 Description of Services

SunLine Transit Agency provides a range of public transportation services tailored to meet the needs of Coachella Valley (“Valley”) residents and visitors. These services include the SunBus fixed-route system, the Route 10 Commuter Link, SunRide on-demand microtransit, and SunDial paratransit. Each service plays a crucial role in providing accessible and sustainable transportation options. Figure 1-7 provides an overview and brief description of these services.

**Table 1** Description of Services by Mode/Route

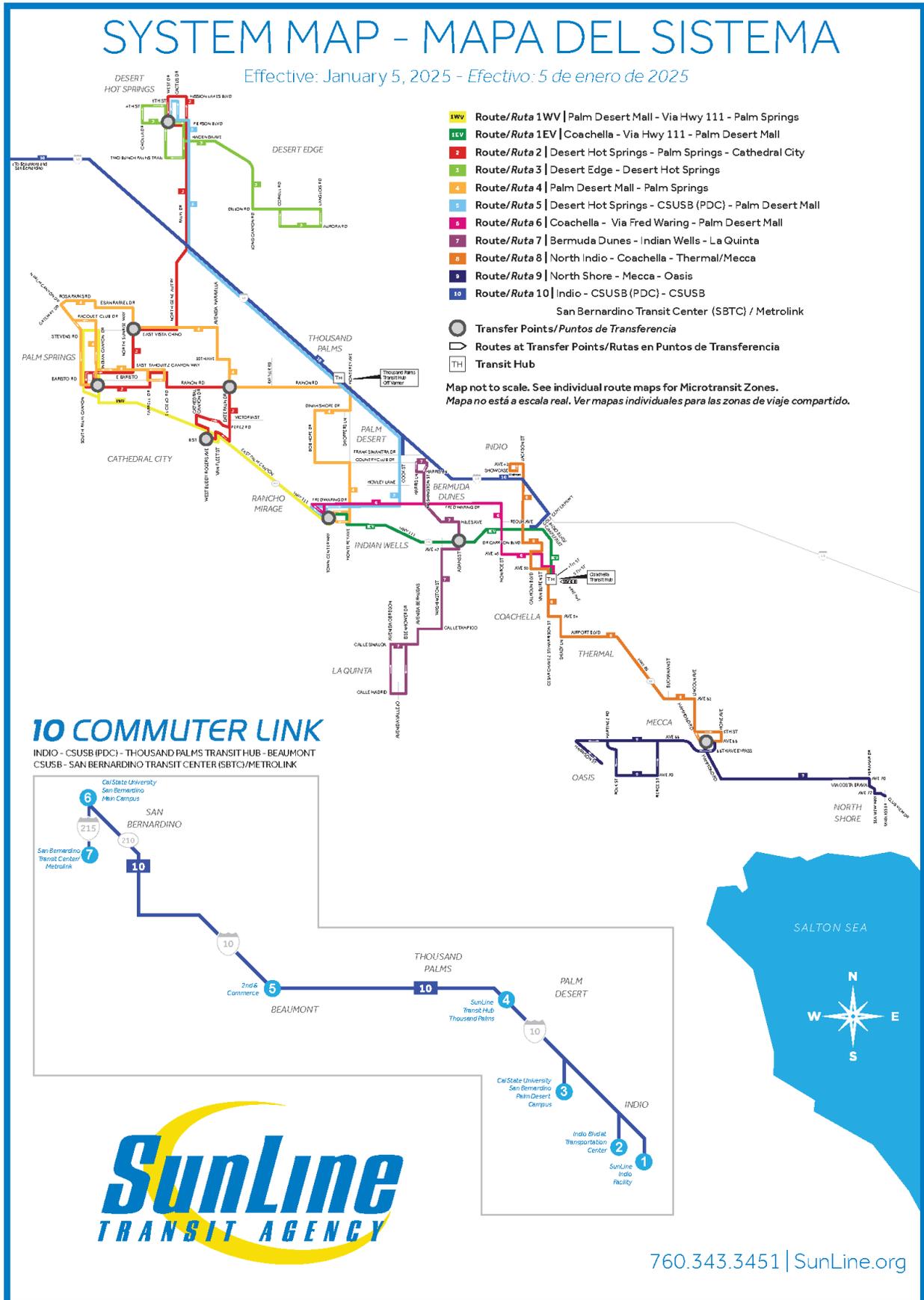
Routes	Route Classification	Major Destinations	Cities/Communities Served	Connections
1WV	Trunk	Hospital, Medical, Shopping, Center of Employment Training and Schools	Palm Springs, Cathedral City, Rancho Mirage and Palm Desert	2, 4, 5 and 6
1EV	Trunk	Hospital, Medical, Shopping, College, Center of Employment Training and Schools	Palm Desert, Indian Wells, La Quinta, Indio and Coachella	4, 5, 6, 7, 8 and 10 Commuter Link
2	Trunk	Shopping, Schools, Employment Center, Library, Senior Center, Medical, Social Security, Theaters, Airport, Court House and Social Services	Desert Hot Springs, Palm Springs and Cathedral City	1WV, 1EV, 3, 4 and 5
3	Feeder	Shopping Centers, Senior Center, Library, Community Center, City Hall, Medical and Schools	Desert Hot Springs and Desert Edge	2 and 5
4	Feeder	Shopping, Medical, Library, Social Services, Theaters, Schools, College, Medical and City Hall	Palm Springs, Cathedral City, Rancho Mirage, Palm Desert and Thousand Palms	1WV, 1EV, 2, 5 and 6
5	Feeder	Shopping, Senior Center, Library, Community Center, Schools, College, Medical, City Hall and University	Desert Hot Springs and Palm Desert	1WV, 1EV, 2, 3, 4, 6 and 10 Commuter
6	Feeder	Shopping, School, Tennis Gardens, Workforce Development, Social Services, Medical & College	Palm Desert, Indian Wells, La Quinta, Indio, Bermuda Dunes and Coachella	1WV, 1EV, 4, 5, 7 and 8
7	Feeder	Shopping, Schools, Theaters, Tennis Gardens and Medical	La Quinta, Palm Desert, Indian Wells, and Bermuda Dunes	1EV and 6
8	Feeder	Shopping, School, Senior Center, DMV, Community Center, College, City Hall,	Indio, Coachella, Thermal and Mecca	1EV, 6, and 9

		Center of Employment Training and Medical		
9	Feeder	Shopping, Community Center, Medical and Schools	Mecca, North Shore and Oasis	8
10	Feeder	Shopping, Business, Entertainment and University	Indio, Palm Desert, Beaumont, San Bernardino	1EV, 5, OmniTrans, RTA, Metrolink and Beaumont Transit
SunDial	Paratransit	Shopping Centers, Senior Center, Library, Community Center, City Hall, Medical and Social Services	All cities/communities within ¼ of a mile on either side of a SunBus fixed route.	All Routes
SunRide	Micro-transit	Shopping, Schools, Employment Center, Library, Senior Center, Medical, Social Security, Theaters, Airport, Court House and Social Services	Desert Hot Springs, Palm Springs, Cathedral City, Palm Desert, La Quinta, Indio, Coachella, Mecca/North Shore	1EV, 1WV, 2, 3, 4, 5, 6, 7, 8, 9, and 10

### 1.3.1 SunBus – Local Fixed Route Service

SunLine's **SunBus** network consists of nine local routes that are divided into trunk routes and connector/feeder routes to enhance coverage and efficiency. The trunk routes—Routes 1EV, 1WV, and 2—serve the busiest corridors along Highway 111 in the Valley, offering frequent service. These routes facilitate connections between major cities, commercial hubs, and employment centers. On the other hand, the connector/feeder routes, which include Routes 3 through 9, provide access to lower-density areas. They link passengers to the trunk lines, ensuring connectivity throughout SunLine's service area. The SunBus system map is shown in Figure 1-7.

Figure 1-7 SunBus System Map



SunLine's SunBus routes run every day of the week year-round, except on Thanksgiving and Christmas Day. They are serviced by a fleet of eighty-eight fixed route buses powered by clean fuel, including Compressed Natural Gas (CNG), Hydrogen Fuel Cell Electric Buses (FCEB), and Battery Electric Buses (BEB). All fixed-route buses are equipped with free Wi-Fi, USB charging ports, air conditioning, wheelchair accessibility with securement systems, approximately thirty-two seats with standing options, and external bike racks. SunBus currently accepts fares in cash, mobile tickets, and issued paper passes.

**Figure 1-8** SunLine Division I Fueling Station and Bus Yard



SunBus fixed-route service offers external connections to transportation options located outside of the service area, including Morongo Basin Transit, RidePV (hospital shuttle), Amtrak, Greyhound, and FlixBus. Furthermore, SunBus provides internal transfers to its Regional Express Service, the Route 10 Commuter Link.

During fiscal year (FY) 2024, SunBus reported a total ridership of 2,585,789 passengers. Over 361 days of service, SunBus covered 2,476,499 revenue miles and operated for 176,188 revenue hours.

### 1.3.2 Route 10 Commuter Link – Regional Express Service

SunLine offers the **Route 10 Commuter Link**, a regional express service designed to seamlessly connect the Coachella Valley with the Inland Empire. Introduced in July 2021, this service provides a direct, efficient, and affordable transit option for commuters, students, and travelers needing access to destinations beyond SunLine’s local routes.

The Route 10 Commuter Link offers limited-stop service between CSUSB’s Palm Desert and San Bernardino campuses, making it a valuable transportation option for students. Additionally, SunLine provides direct access to the San Bernardino Transit Center (SBTC), allowing riders to connect with Metrolink commuter rail and multiple regional transit providers, including the Riverside Transit Agency, Omnitrans, Victor Valley Transit Authority, and Mountain Transit. These connections enhance accessibility to job centers, educational institutions, and essential services throughout Southern California.

Figure 1-9 10 Commuter Link Regional Connections Map



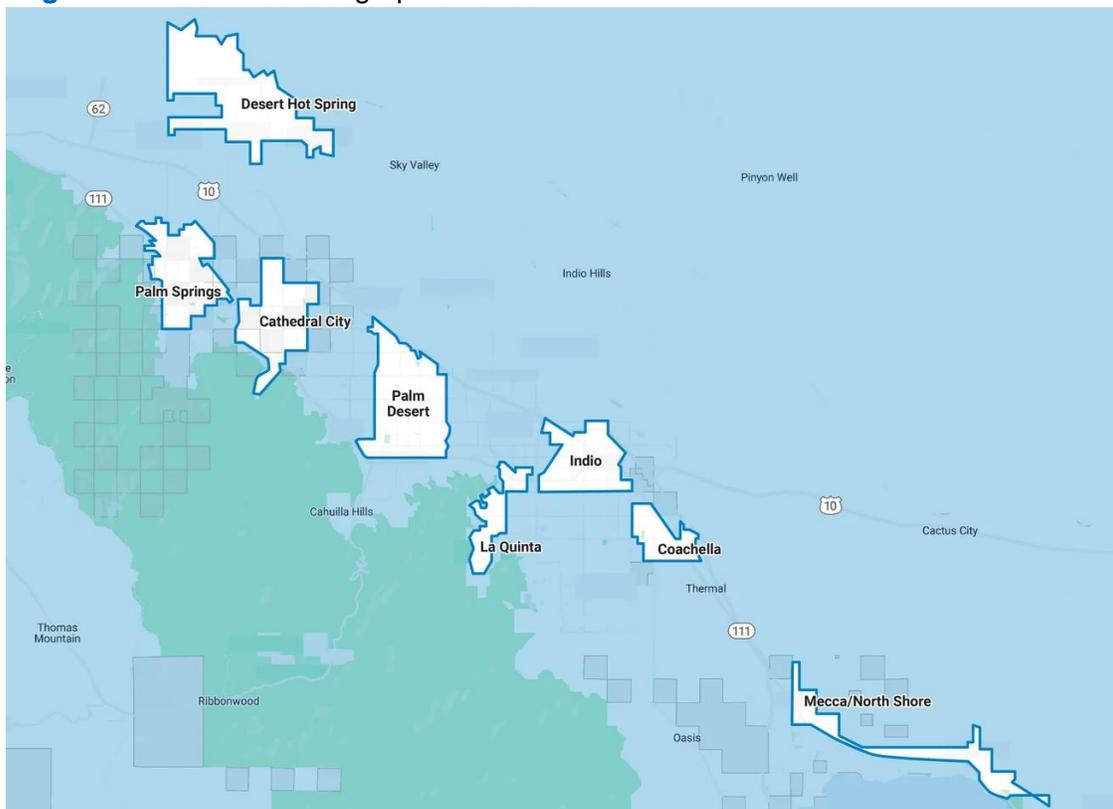
This route operates Monday through Friday and is serviced by CNG powered MCI coaches. These buses offer Wi-Fi, reclining seats, and USB charging ports. Route 10 Commuter Link accepts fares in cash, mobile pass and is free for California State University San Bernardino students and faculty with valid CSUSB ID card.

During FY 2024, the 10 Commuter Link reported a total ridership of 34,422 passengers. Over 251 days of service, the Commuter Link covered 185,319 revenue miles and operated for 5,589 revenue hours.

### 1.3.3 SunRide – On-Demand Microtransit

SunLine offers **SunRide**, an innovative on-demand rideshare service designed to provide flexible and dynamic transportation solutions. SunRide functions as a first-mile/last-mile connector, linking riders to the fixed-route network and other key destinations within the riders city. Similar to other rideshare services, users in designated areas or “zones” can specify the details of their trips on a mobile application and a vehicle is dispatched to deliver them to their destinations. SunRide’s shared-ride service operates within eight designated zones across the Coachella Valley. This service geo-fenced zones are located in Cathedral City, Coachella, Desert Hot Springs (including Desert Edge), Indio, La Quinta, Mecca-North Shore, Palm Desert, and Palm Springs. Figure 1-10 illustrates the eight geo zones and their service area.

**Figure 1-10** SunRide Geographic Zones



SunRide trips can be booked in real-time using the mobile application, which is also called SunRide, or by calling customer service to speak with a representative. After setting the trip parameters in the SunRide app, the rider is matched with a driver and vehicle, along with a pickup time and estimated wait time. Payment for SunRide can be made directly through the app using a credit or debit card, or riders can choose to pay with cash, which they can give to the driver upon entering the vehicle. SunRide operates within the same fixed-route service hours, Monday through Friday, based on SunLine's available resources, such as the number of vehicles deployed in each zone.

During FY 2024, SunRide reported a total ridership of 22,435 passengers. Over 251 days of service, SunRide vehicles covered 118,035 revenue miles and operated for 27,705 revenue hours.

**Figure 1-11** SunRide Vehicle



### **1.3.4 SunDial – ADA Paratransit Service**

SunLine also operates **SunDial**, a fully ADA-compliant paratransit service designed to provide accessible, shared-ride transportation for individuals who are functionally unable to use SunLine’s fixed-route services, either permanently or under certain conditions. This origin-to-destination service ensures that passengers with disabilities or mobility challenges can travel safely and conveniently throughout the Coachella Valley. SunDial services are only available within  $\frac{3}{4}$  of a mile from all SunBus fixed routes. Riders who would like to utilize this service must complete SunLine’s eligibility process and receive a SunDial ADA Certification ID Card. Riders of SunDial can utilize this service for transportation needs, including medical appointments, shopping, and social activities.

**Figure 1-12** SunDial Vehicle



SunDial services requires advance reservation for pick-up and can be scheduled up to seven day prior by calling SunLine’s customer service. SunDial operates at the same times, days and frequency of local fixed routes service.

During FY 2024, SunDial reported a total ridership of 119,492 passengers. Over 361 days of service, SunDial vehicles covered 866,842 revenue miles and operated for 58,412 revenue hours.

### 1.3.5 SunLine Regulatory Administration & Taxi Services

SunLine Services Group (SSG) is a joint powers agency formed in 1993 between Riverside County and cities in the Coachella Valley. While sharing administrative resources with SunLine Transit Agency (STA), SSG is distinctly authorized to regulate the operation of taxicab services in the Coachella Valley. The SunLine Regulatory Administration (SRA) is the division of SSG responsible for enforcing and implementing the taxicab service ordinance, which covers licensing and legal compliance. SRA plays an important role in fostering innovation and accessibility within the taxi industry.

SRA permits and monitors four taxi businesses currently operating in the region.

**Figure 1-13** Taxi Businesses in Coachella Valley

Taxi Businesses	Vehicles	Number of Drivers
City Cab	25	29
Coachella Valley Taxi	30	31

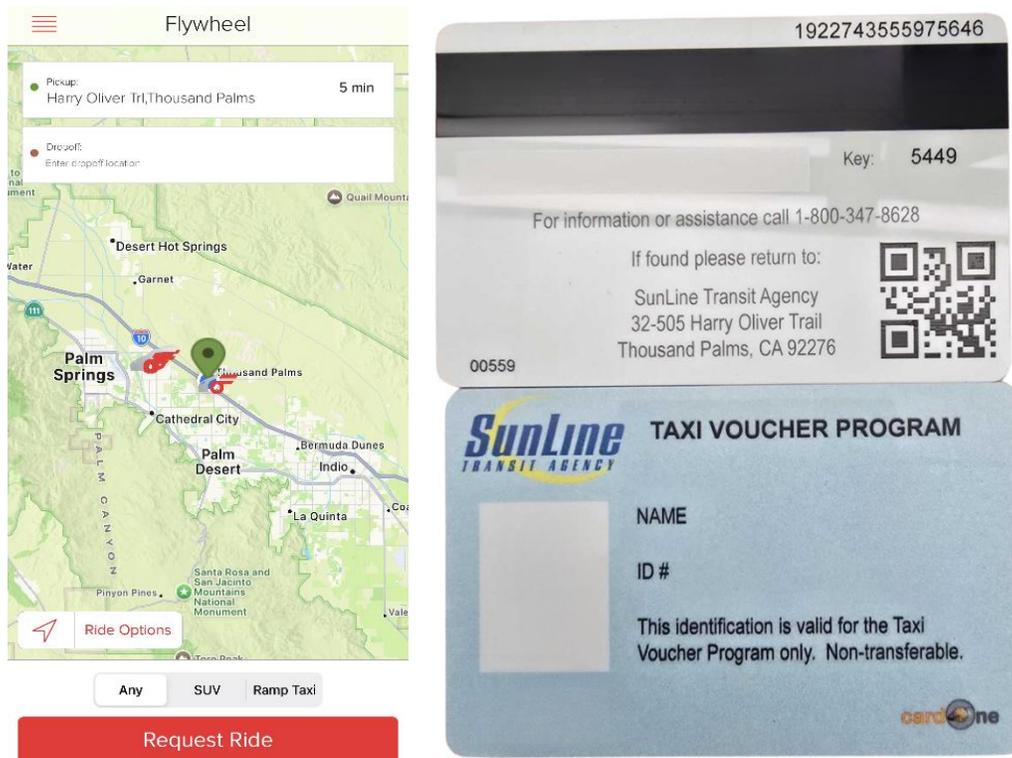
Taxi Businesses	Vehicles	Number of Drivers
Palm Springs Taxi Service	10	14
Yellow Cab of the Desert	25	43

As a result of a collaboration with taxi services, passengers can book e-hail trips using the Flywheel app, allowing them to request a cab, receive upfront pricing, and connect with the nearest available driver.

### 1.3.6 Taxi Voucher Program (TVP)

To further enhance mobility options for seniors and persons with disabilities, SunLine offers a Taxi Voucher Program (TVP) through a matching funds program that subsidizes taxi trips throughout the Coachella Valley. The program is available to seniors (60+) and persons with disabilities. It is administered via a taxi smart card that functions similarly to a prepaid debit card. SunLine’s Taxi Voucher Program provides a dollar-for-dollar match of up to \$75 per month, allowing for a maximum of \$150 every 30 days. The remaining funds from previous months are carried over until utilized. A key benefit of this program is that through SunLine’s matching contribution, the amount available for cardholders to use on taxi trips is doubled, allowing for more taxi trips.

**Figure 1-14** Flywheel Mobile Application and TVP Card



This program is serviced by all four (4) taxi businesses permitted to operate in the Coachella Valley listed in Figure 1-14. Riders can book a cab and pay their fare directly with the smart card or through the Flywheel app where their TVP card can be loaded as a payment method.

## 1.4 Fare Structure and Programs

### 1.4.1 Current Fare Structure

SunLine's fare structure differentiates prices based on the types of transit customers and services. The main fare categories include Adult, Youth, and Senior (60+)/Disabled. SunLine also manages several fare payment programs and partnerships throughout the Coachella Valley, extending to nearby college campuses. Accepted fare media include cash, issued paper passes, and mobile tickets (when available). SunLine's fares comply with the FTA's Half Fare rule for Senior (65+) and disabled travelers.

The last change in base fare was approved by the governing Board in 2002, raising the base fare from 75 cents to \$1. A recommendation to eliminate the 25-cent transfer fare and incrementally raise the base cash fare to \$1.50 was presented in 2011, but no implementation occurred.

Figure 1-15 shows the existing SunLine fare structure.

**Figure 1-15** SunLine Fare Structure

<b>SunBus FARES &amp; PASSES</b>					<b>SunRide FARE</b>	
	Single Ride Fare	Day Pass	10-Ride Pass	31-Day Pass	STANDARD FARE	\$3.00 ONE-WAY PER PERSON INCLUDES ONE TRANSFER TO SUNBUS
ADULT	\$1.00	\$3.00	\$10.00	\$34.00		
YOUTH	\$0.85	\$2.00	\$8.50	\$24.00		
60+ YEARS/ DISABLED	\$0.50	\$1.50	\$5.00	\$17.00		
TRANSFERS	\$0.25	INCLUDED	\$0.25	INCLUDED		
<b>10 COMMUTER LINK FARES &amp; PASSES</b>					<b>SunDial FARE</b>	
	Single Ride	Day Pass		30-Day Pass	MUST MEET SUNDIAL ELIGIBILITY CRITERIA	
ADULT/YOUTH	\$6.00	\$14.00		\$150.00	TRAVEL WITHIN SAME CITY	\$1.50 ONE-WAY PER PERSON
60+ YEARS/ DISABLED	\$4.00	\$10.00		\$100.00	TRAVEL BETWEEN MULTIPLE CITIES	\$2.00 ONE-WAY PER PERSON
CSUSB STUDENTS, STAFF & FACULTY	Free w/ valid CSUSB ID					

**10 Commuter Link Discounted Fare: \$1.00 during off peak hours (see page 60 for those times). Local fare also applies.**

Source: SunLine Transit Agency, Rider's Guide (January 2025)

### 1.4.2 Cash Fares/ Single Ride Fare/ Transfers

SunLine offers riders the lowest fares in the region. An adult can board the SunBus for \$1 for a single ride or take the Route 10 Commuter Link to San Bernardino for \$6. Both the fixed route and Route 10 Commuter Link services provide the option for single trip riders to purchase a 25-cent transfer for unlimited rides on the fixed route within 2 hours of purchase. Transfers can only be purchased upon boarding and are valid only on the day they are issued.

The base cash fare for seniors, defined by SunLine as individuals 60 years of age or older, is 50 cents for all fixed-route services and \$4 for the 10 Commuter Link. Individuals qualifying as ADA also pay a 50-cent cash fare on all fixed-route services. Medicare cards, Department of Motor



Vehicles driver's licenses or senior ID cards, ADA certification cards, and SunLine Half Fare ID cards are accepted as proof of age or disability.

A discounted youth fare of 85 cents is available for children between the ages of 5 and 17 on fixed routes. Children who are 4 years old and younger ride free with a paid adult cash fare (maximum of two children). All cash fares must be paid with exact change, as operators do not carry coins.

### **1.4.3 Fare Passes**

SunLine's SunBus currently offers three types of fare passes: the Day Pass, 31-Day Pass, and 10-Ride Pass. Daily and 30-Day monthly passes are also available for the 10 Commuter Link service, but they are priced and sold separately from the general fixed-route passes. SunLine's ADA paratransit also provides a 10-Punch card for use with SunDial services. Day Passes can be purchased directly from bus operators, while all other passes must be obtained at designated SunLine pass outlets or through a mobile transit app (Token Transit and Transit App). Pass outlets are located throughout the service area for easy access by riders.

#### *Day Pass*

The SunLine Day Pass is available for \$3 and allows unlimited rides on all fixed routes for the duration of one calendar day. In accordance with the FTA's Half Fare rule, the Day Pass for seniors and disabled riders costs \$1.50. The Day Pass for youth riders is priced at \$2. Sold separately, the Day Pass for the 10 Commuter Link is \$14 for adults and \$10 for seniors.

#### *31-Day Pass/ 30-Day Pass*

SunLine offers a pass that is valid for a rolling 31-day period from the date of first use for fixed routes. The 31-Day Pass costs \$34 for general adult riders, \$17 for seniors and disabled riders, and \$24 for youth. The monthly pass for the 10 Commuter Link is a 30-day option available for \$150 (the 10 Commuter Link operates only Monday through Friday).

#### *Multiple Ride (10-Ride) / 10-Punch Card (SunDial)*

A 10-Ride Pass costs \$10 for general adult riders, \$5 for seniors and disabled riders, and \$8.50 for youths (ages 5 to 17). This pass is not discounted and is priced at ten times the base cash fare. The SunDial 10-Punch Card is available for travel within the same city for \$15 and \$20 for those traveling across multiple cities.

#### *SunDial*

SunDial service fares are determined by the origin city and final destination. If a rider books a ride within the same city of origin, the fare is \$1.50 one-way per person. For travel between multiple cities, the fare is \$2 one-way per person. Riders must meet SunDial eligibility criteria to use this service. All cash fares should be paid with the exact amount, as SunDial operators do not carry change.

#### *SunRide*



SunRide services have a standard fare of \$3 for a one-way trip per person and include one transfer to SunBus. There is no discount from the base fare for this service. Riders can purchase single rides with exact fare upon boarding or pay the fare digitally using the SunRide app.

#### **1.4.4 Fare Payment Programs**

SunLine Transit Agency offers several fare payment programs designed to expand the agency's potential rider base and enhance the system's existing ridership. SunLine's fare payment programs include the Coachella Valley Employer Pass Program, Half-Fare Program, and Haul Pass Program.

##### *Coachella Valley Employer Pass Program*

The Coachella Valley Employer Pass incentive program allows businesses to sponsor 31-day fixed-route passes for their employees to travel to and from work. This program offers employees the opportunity to ride fixed-route services at no cost. Passes are purchased by each employer at a discounted price of \$24 per pass and are valid for 31 consecutive days.

##### *Half-Fare Program*

Based on Federal Transit Administration (FTA) guidelines, SunLine offers riders who are 60 years of age or older, as well as individuals with disabilities, a half-fare on fixed route services. To qualify for this program, applicants must present a current, non-expired government-issued photo identification, Medicare card, or SunLine ADA certification card.

##### *Haul Pass*

In support of student riders in the community, SunLine established the Haul Paul (HP) program to reduce transportation barriers to educational opportunities. SunLine's Haul Pass Program offers free fares for local fixed-route services to students of Coachella Valley high schools and College of the Desert (COD), as well as free fares for Route 10 Commuter Link to California State University San Bernardino faculty and students. To participate in the program, students must be enrolled and complete an application. Haul Passes are provided as 31-day paper passes (high school), mobile passes via Token Transit (high school & COD), and if applicable, students can utilize their active student ID (only CSUSB) when boarding.

#### **1.4.5 Fare Payment Technology**

SunLine provides a variety of fare payment options to meet the needs and preferences of its riders, including both cash and cashless methods.

##### *Farebox*

For payments on SunBus routes, the system uses electronic fareboxes. These fareboxes accept cash, coins, and pre-purchased passes, and they issue paper one-day and transfer passes as well.

### *Token Transit and Transit App*

SunLine partners with both Token Transit and Transit App to offer cashless fare payment options through mobile applications. These apps enable riders to purchase and store fare media digitally on their smartphones, requiring a linked debit or credit card. Both apps are compatible with SunBus, Commuter Link, and SunDial services. Token Transit primarily acts as a platform for purchasing tickets and serves as the exclusive provider for the Haul Pass program. In contrast, Transit App not only allows fare purchasing but also provides features such as trip planning and bus tracking, thereby enhancing navigational assistance for riders.



*Token Transit and Transit App Logos*

### *SunRide Application*

The SunRide service provides a dedicated mobile application, also called SunRide, which integrates trip planning and fare payment. Riders can link a debit or credit card for digital payments before pick-up or opt to pay in cash when boarding, as noted in the app.

### *Flywheel*

For taxi services in the Coachella Valley, payments can be made through the Flywheel app. This app enables riders to book and pay for rides electronically using a linked debit card, credit card, or Taxi Voucher Program (TVP) card. Alternatively, riders can call to request a taxi and pay the driver in cash upon arrival.

## **1.5 Revenue Fleet**

In accordance with the Innovative Clean Transit (ICT) Regulation, SunLine is committed to transitioning to a fully zero-emission fleet by 2035, as outlined in its Zero Emission Bus Rollout Plan. SunLine's current fleet comprises 49 vehicles in its active fixed-route service and 39 (or 49) vehicles in its paratransit fleet. The fuel makeup and contingency allocations are elaborated on below.

## 1.5.1 Fixed Route

**Figure 1-16** Fixed-Route Bus



SunLine's fixed-route services are supported by a fleet of forty-six 40-foot and three 45-foot buses in service, along with thirty-nine vehicles in the contingency fleet. This fixed-route fleet includes CNG, hydrogen fuel cell (FCEB), and battery electric buses (BEB).

**Table 1.1 - Fleet Inventory**  
FY 2024/25 Short Range Transit Plan  
SunLine Transit Agency

Bus (Motorbus) / Directly Operated

Year Built	Mfg. Code	Model Code	Seating Capacity	Lift and Ramp Equipped	Vehicle Length	Fuel Type Code	# of Active Vehicles FY 2023/24	# of Contingency Vehicles FY 2023/24	Life to Date Vehicle Miles Prior Year End FY 2022/23	Life to Date Vehicle Miles through March FY 2023/24	Average Lifetime Miles Per Active Vehicle As Of Year-To-Date (e.g., March) FY 2023/24
2018	BYD	K9	35	4	40	EB	4		52,006	36,518	9,129
2012	EDN	AXCESS	37	1	40	HY	1		3,336	149	149
2014	EDN	AXCESS	39	1	40	HY	1		7,298	4,338	4,338
2014	EDN	AXCESS	37	1	40	HY	1		15,413	3,348	3,348
2014	EDN	AXCESS	37	1	40	HY	1		2,587	679	679
2015	EDN	AXCESS	37	0	40	HY	0		3,056	95,814	
2018	EDN	AXCESS	37	3	40	HY	3		65,633	29,657	9,885
2018	EDN	AXCESS	37	2	40	HY	2		50,979	5,099	2,549
2009	EDN	EZRider32'	29	2	32	CN	2		161,372	23,691	11,845
2020	MCI	D4500	40	2	40	CN	2		146,856	137,808	68,904
2021	MCI	D4500	57	1	45	DF	1		49,687	41,569	41,569
2022	MCI	D4500	57	1	45	CN	1		663	499	499
2007	NFA	C40LF	42	8	40	CN	8			118,986	14,873
2008	NFA	XCELSIOR C	39	9	40	CN	9		488,613	447,214	49,690
2008	NFA	XCELSIOR C	39	20	40	CN	20		1,114,532	778,042	38,902
2016	NFA	XCELSIOR C	39	6	40	CN	6		322,119	271,012	45,168
2020	NFA	XCELSIOR C	39	6	40	CN	6		361,537	258,353	43,058
2021	NFA	XCELSIOR C	39	4	40	CN	4		285,935	182,028	45,507
2018	NFA	XCELSIOR H	39	1	40	HY	1		3,056	1	1
2018	NFA	XCELSIOR H	39	5	40	HY	5		118,940	32,485	6,497
2021	NFA	XCELSIOR H	39	4	40	HY	4		104,977	58,012	14,503
2021	NFA	XCELSIOR H	39	6	40	HY	6		67,167	71,067	11,844
<b>Totals:</b>			872	88			88		3,425,762	2,596,369	29,504

## 1.5.2 Paratransit

Figure 1-17 Paratransit Cutaway



SunLine's Paratransit service is supported by 39 CNG-powered vehicles.

**Table 1.1 - Fleet Inventory**  
 FY 2024/25 Short Range Transit Plan  
 SunLine Transit Agency

Demand Response / Directly Operated

Year Built	Mfg. Code	Model Code	Seating Capacity	Lift and Ramp Equipped	Vehicle Length	Fuel Type Code	# of Active Vehicles FY 2023/24	# of Contingency Vehicles FY 2023/24	Life to Date Vehicle Miles Prior Year End FY 2022/23	Life to Date Vehicle Miles through March FY 2023/24	Average Lifetime Miles Per Active Vehicle As Of Year-To-Date (e.g., March) FY 2023/24
2020	ARB	Freedom	12	15	27	CN	15		52,524	396,184	26,412
2015	EDN	AEROTECH	12	1	22	CN	1		224,201	10,553	10,553
2016	EDN	AEROTECH	12	9	22	CN	9		237,032	161,824	17,980
2018	SPC	Senator	12	14	23	CN	14		149,946	303,721	21,694
<b>Totals:</b>			48	39			39		663,703	872,282	22,366

## 1.6 Existing Transit Facilities and Bus Stop Amenities

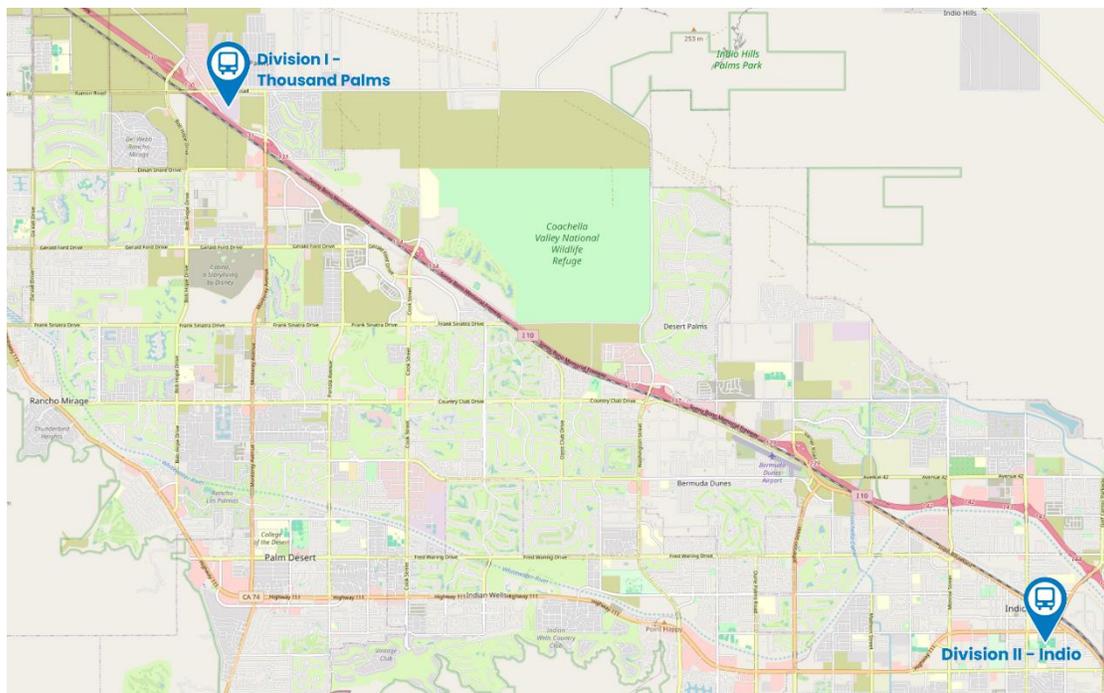
### 1.6.1 Facilities

SunLine Transit Agency operates out of two facilities situated at the northern and eastern ends of its Coachella Valley service area, as pictures in Figure

#### *Division I – Thousand Palms*

Division I, located at 32-505 Harry Oliver Trail in Thousand Palms, serves as the primary headquarters of SunLine Transit Agency for administrative, operations, maintenance, and facility management staff. Spanning 20.5 acres, Division I includes a maintenance, operations, and administrative building, housing most of the agency’s assets, including both revenue and non-revenue vehicles. Daily operations such as pull out/in, vehicle maintenance, dispatching, customer service, and training primarily take place at this location. Additionally, Division I functions as the agency’s main fueling center, equipped with hydrogen and CNG fueling dispensers and battery electric charging stations.

**Figure 1-17** SunLine Facilities



#### *Division II – Indio*

Division II, located on a 2.31-acre site at 83-255 Highway 111 in Indio, operates as a satellite facility for vehicle maintenance and storage. This division supports several vehicle maintenance operations and houses equipment for the Stops and Zones department, which is responsible for maintaining bus shelters and amenities. Division II also includes a public CNG fueling station, serving as a secondary fueling source for the agency’s CNG fleet.

## 1.6.2 Transit Hubs

SunLine Transit Agency maintains two transit hubs: one in Thousand Palms and the other in Coachella.

### *Thousand Palms Transit Hub*

The Thousand Palms Transit Hub is conveniently located at 72420 Varner Road near Division I. The Thousand Palms Hub serves as both a transit boarding point and a park-and-ride for travelers along the CA I-10 Highway. This hub exclusively services SunLine's regional express Route 10 Commuter Link, connecting riders to destinations in the eastern valley and cities outside our jurisdiction. This 74,487 square-foot transit hub features 84 parking spaces: 79 standard spaces and 5 ADA-accessible ones, offering riders amenities such as shade structures, seating, and restrooms.

**Figure 1-18** Thousand Palms Transit Hub Aerial



### *Coachella Transit Hub*



**Figure 1-19** Coachella Transit Hub

The Coachella Transit Hub, a project completed in 2024 in collaboration with the City of Coachella, is located at the corner of 4th Street and Cesar Chavez in Coachella. This hub was funded by the Affordable Housing and Sustainable Communities (AHSC) Grant to enhance transit accessibility to neighboring affordable housing and reduce greenhouse gas (GHG) emissions for the eastern valley communities. It serves Routes 1, 8, and 6

and acts as a connecting point for riders traveling to and from the far eastern side of the Coachella Valley (North Shore) to the rest of the valley and beyond. This newly constructed 540 sq. ft. hub features shade structures, benches, a bicycle rack, a water fountain, and a break room for bus operators.

## 1.6.3 Park-and-Rides

Park-and-ride facilities offer convenient access to public transportation by providing free parking for commuters. The California State University, San Bernardino – Palm Desert (CSUSB-PD) Campus acts as a park-and-ride for SunLine customers, primarily benefiting students and staff traveling between the Palm Desert and San Bernardino campuses. Both locations are served exclusively by the 10 Commuter Link, although SunLine does not maintain these facilities.

## 1.6.4 Bus Stop Amenities

SunLine’s bus system features 571 bus stops within the Coachella Valley service area, plus three additional stops in the partnering cities of Beaumont and San Bernardino. SunLine’s Bus Stop Amenity standard ensures that all stops are equipped with a bench and waste container, while stops with an average of at least 10 daily passenger boardings will have a shelter if conditions permit. All bus stops are installed according to ADA requirements. Figure 1-20 illustrates the number of stops and those with shelters by city or district.

**Figure 1-20** Bus Stop by City/District

City/District	Total Stops	Total Shelters	
		Count	Percent
Cathedral City	61	52	85%
Coachella	34	31	91%
Desert Hot Springs	48	36	75%
Indian Wells	15	13	87%
Indio	87	59	68%
La Quinta	52	36	69%
Palm Desert	52	42	81%
Palm Springs	121	92	76%
Rancho Mirage	33	25	76%
Riverside County uninc.	68	28	41%
<i>Thermal</i>	8	2	25%
<i>Oasis</i>	10	3	30%
<i>Mecca</i>	17	8	47%
<i>One Hundred Palms</i>	3	2	67%
<i>Thousand Palms</i>	9	9	100%
<i>North Shore</i>	11	1	9%
<i>Desert Edge</i>	7	0	0%
<i>Bermuda Dunes</i>	3	3	100%
<b>Total</b>	<b>571</b>	<b>414</b>	<b>73%</b>
Outside Coachella Valley			
<i>Beaumont</i>	1	1	100%
<i>San Bernardino</i>	2	2	100%

Source: Trapeze

## 1.7 Existing Coordination Between Transit Agencies

### Federal Agency Partners

SunLine collaborates with and reports to the U.S. Department of Transportation (USDOT), specifically the Federal Highway Administration (FHWA) and the Federal Transit Administration (FTA). These agencies offer funding and technical assistance for various transportation projects.

### State Agency Partners



SunLine collaborates with the California State Transportation Agency (CalSTA), which oversees transportation policies and programs across the state. Key departments within CalSTA include the California Transportation Commission (CTC) and the California Department of Transportation (Caltrans). CTC and Caltrans manage vital programs such as the Active Transportation Program and the Low Carbon Transit Operations Program (LCTOP). The California Air Resources Board (CARB) and the California Energy Commission (CEC) are essential partners in SunLine's mission to reduce emissions and promote sustainable transportation. CARB sets air quality standards, while CEC advocates for the transition to 100% clean energy. These agencies run programs like the Clean Transportation Grant, which supports the adoption of zero-emission vehicles.

### *Regional Agency Partners*

Regional agency partners include the Southern California Association of Governments (SCAG), which is the metropolitan planning organization for the region, and the Coachella Valley Association of Governments (CVAG), the regional planning agency for the Coachella Valley. CVAG oversees the development and implementation of regional transportation projects such as the CV Link and CV Sync programs, and it plays a crucial role in managing roadway infrastructure within the valley.

### *County-Level Partners*

The Riverside County Transportation Commission (RCTC) is a vital partner for SunLine. RCTC distributes funds from Measure A, a voter-approved sales tax, with 15% designated for public transportation in the Coachella Valley. Additionally, RCTC manages various funding programs, including the State of Good Repair (SGR) Program and the Transit and Intercity Rail Capital Program (TIRCP), which support improvements to transportation infrastructure.

### *Subregional Agency Partners*

Subregional partners in the Inland Empire include agencies such as the Riverside Transit Agency (RTA), Omnitrans, Metrolink, Mountain Transit Authority, Victor Valley Transit Authority, City of Banning Transit, City of Beaumont Transit, and City of Corona Transit. Although direct service connections between SunLine and these agencies may be limited, operating within the same region creates opportunities for collaboration and information sharing, fostering a more interconnected transportation network throughout the Inland Empire.

### *Local Agency Partners*

SunLine collaborates with several nearby transit agencies to enhance mobility options for riders. These agencies include Morongo Basin Transit, Palo Verde Valley Transit, OmniTrans, FlixBus, and Amtrak, which provide connecting services at shared stops within SunLine's service area and accept selected fare media.

## **1.8 Reference List of Prior or Existing Studies and Plans**

SunLine's operations, performance, and service planning are guided by a series of studies aimed at better understanding its rider population, exploring the latest low-emission fuel technologies, improving facilities, and redesigning its network. These reports and studies have either been initiated by SunLine itself or mandated by federal and state agencies. In the past, these reports have also influenced the development of the Short Range Transit Plan (SRTP).

- *Bus Rider Survey Study* (February 2015)
- *SunLine Transit Feasibility Study Hydrogen Station Expansion* (January 2016)
- *SunLine Transit Facilities Master Plan* (November 2016)
- *SunLine Transit Agency Transit Asset Management* (September 2018)
- *Network Study Report SunLine Transit Redesign & Network Analysis* (February 2019)
- *Innovative Clean Transit (ICT) Plan*, presented to SunLine Board of Directors (May 2020)
- *Innovative Clean Transit (ICT) Plan* (Coming 2025)
- *Onboard Ridership Survey* (Coming 2025)
- *Comprehensive Operations Analysis* (Coming 2026)

SunLine Transit Agency recognizes the significance of strategic investment in research and analysis to enhance services, respond to population growth, and meet federal mandates for the benefit of our community.

# CHAPTER 2

## Existing Service & Route Performance



FY26-28 SHORT-RANGE  
**TRANSIT PLAN**

## Chapter 2 Existing Service and Route Performance

SunLine is the sole provider of public transportation in the Coachella Valley, located in Southern California. In the last fiscal year (July 2023 to June 2024), SunLine proudly transported 2,753,390 passengers across its three transit modes, showcasing its commitment to effectively serving the community.



SunLine Transit Agency's initiatives are guided by its clear mission and vision, which offer strategic direction.

**Mission:** Connecting people and improving life by taking you from where you are to where you want to be.

This direction is further influenced by the oversight and funding provided by the Riverside County Transportation Commission (RCTC). The RCTC serves as the regional transportation planning agency for Riverside County and is responsible for developing the regulatory standards for the Short-Range Transit Plan (SRTP). Preparing the SRTP and its supporting data enables RCTC to advocate for local, state, and federal funding to support SunLine's capital projects and transit operations.

RCTC also tracks performance metrics that evaluate the effectiveness and efficiency of SunLine's services, which are reviewed in Sections 2.1 to 2.4.

In January 2023, the Board of Directors approved the revised SunLine Service Standards Policy to provide Agency staff with direction regarding the planning, operation, and management of transit service in the Coachella Valley. The Service Standards Policy and accompanying metrics are intended to:

- promote continuous improvement of transit service
- provide regular updates on service performance
- meet federal requirements for monitoring Title VI of the Civil Rights Act
- avoid uninformed decision-making regarding the provision of service

## 2.1 Description of Key Performance Indicators

### 2.1.1 Service Design Standards

SunLine Transit Agency developed a service standards policy to provide a framework for guidance of staff in the design, operation, and management of SunLine Transit Agency’s transit services. The service standards policy objective is to promote the continuous improvement of transit service throughout the Coachella Valley and the maximization of mobility benefits to the community. Additionally, these service standards support the agency in meet Federal Title VI of the Civil Rights Act of 1964 requirements. SunLine Service Standards Policy was developed 7/13/2013 and revised on 12/7/2022.

Service frequency and span of service can be revised where sustainable (that is, where demand warrants increased frequency, where performance measures can still be met, and when funding can sustain the frequency and span of service).

New routes may be implemented based on a weekday-only service, typically between the hours of 6:00 A.M. and 7:00 P.M., usually when there is a peak demand. During the implementation of new service, a trial period is allocated from 12 to 18 months as an opportunity to provide for service adjustments before deciding to retain, expand, or eliminate the service. Figure 2-1 lists the minimum service frequencies and spans.

**Figure 2-1 Service Frequency Standards**

Frequency and Span by Service Type	Frequency of Service		Span of Service	
	Weekday	Weekend	Weekday	Weekend
Trunk bus routes	20 minutes peak 30 minutes off-peak	30 minutes	5:00 A.M. – 11:00 P.M.	5:00 A.M. – 11:00 P.M.
Local bus routes	30 minutes peak 60 minutes off-peak	60 minutes	5:00 A.M. – 7:00 P.M.	9:00 A.M. – 6:00 P.M.
Market-based services	Based on demand	Based on demand	Based on demand	Based on demand

#### *Network Role*

New services should be evaluated for their place in the overall transit network. Each new route in the network will have a unique role, whether it is facilitating transfers with existing services, introducing service coverage to a recent development, or providing connections between current routes and major destinations. While successful new routes connect with existing services, they should not duplicate existing service or compete for passengers.

### *Market Opportunities*

There is a strong correlation between service performance, surrounding population, and employment densities. In other words, the more people with access to a route, the higher the route's potential ridership. Population-dense areas tend to coincide with mixed-use neighborhoods, walkable environments, and higher populations of transit-friendly constituencies such as students, seniors, zero-vehicle households, and low-income populations. The minimum population and employment density for the introduction of new all-day fixed route transit service is an average of 10 people/jobs per acre within a half mile of the proposed route.

A minimum threshold is considered supportive of fixed route service and should not be subjected to further analysis. Areas in this category that have unmet needs may be served by alternative options to fixed route service.

### *Unmet Mobility Needs*

SunLine will strongly consider the mobility needs of transit-dependent populations when evaluating where to operate service. In assessing the area's demand for transit service, it is important to examine the presence of these demographic groups and identify any unmet needs.

### *Productivity vs. Coverage Target*

The SunLine Board of Directors' goal is to capture choice riders and new riders and to expand transit market share. The Board is committed to investing in new operating plans that improve productivity and, when necessary, improve coverage. This is consistent with the Transportation Development Act of 1971 that established fiscal performance requirements of 20 percent of farebox recovery in urbanized areas and 10 percent in rural areas. To comply with this state mandate, and to improve effectiveness and efficiency, SunLine recommends the following policy for service deployment:

- Seventy percent of fixed-route service should be deployed in areas with higher population and employment densities where transit is able to meet productivity standards.
- Thirty percent of fixed-route service should be deployed to maintain coverage in areas where lower population and employment densities limit transit service productivity.

### *Key Destinations*

Key destinations likely to generate higher demand for transit service include major area schools, colleges, universities, hospitals, retail/commercial/entertainment centers with more than 10 people/jobs per acre, open residential communities, and those with relatively lower income and vehicle ownership levels.

#### **2.1.2 Service Productivity Standards**

Passengers per revenue hour and passengers per revenue trip are KPIs that measure service effectiveness, or productivity, based on ridership (passenger boardings) generated for each hour of revenue service for local and trunk routes and boardings per trip for market-based services operated (see Figure 2-2).

**Figure 2-2 Passengers Per Revenue Hour/Revenue Trip Standards**

Refueled Routes 1/3/2021 to 6/30/2021		
Service Tiers	Routes in Service Type	Passengers Per Revenue Hour Standard
Trunk routes	Routes 1EV, 1WV, 2	20
Local routes	Routes 3, 4, 5, 6, 7, 8, 9	10
Market-based services	10 Commuter Link	10*

\* Boardings per trip – is the productivity measure for market-based routes

### 2.1.3 Service Quality Standards

Service quality standards contribute to the reliability and consistency of service delivery. Customers may first be attracted to transit service based on headway and span. Choice riders may continue to use services because they know they can get to their destinations on time—unreliable service usually results in decreased ridership. Service quality standards are proposed to be measured using the following operational and passenger experience metrics:

- service scheduled speed (service quality)
- on-time performance (service reliability)
- runtime variance (service reliability)
- percent service completed (service reliability)
- miles between service interruption (service reliability)
- load standards (service comfort)
- average fleet age (service comfort)
- bus deployment standards

Each suggested metric is discussed in more detail below.

**Service Scheduled Speed:** Measures the route’s scheduled service speed. The measure is calculated by dividing revenue miles by revenue hours for each route. This KPI monitors services needed to maintain reasonable speed to retain and grow ridership.

The target performance scheduled speed is 12.5 miles per hour (mph) for SunLine’s transit system, as shown in Figure 2-3.

**Figure 2-3 Service Scheduled Speed Standard**

Service Mode	Service Speed - Weekdays	Service Speed - Weekends
Fixed Route Bus	12.5 MPH	12.5 MPH

**On-time Performance:** This KPI measures service reliability as defined by adherence to the published service schedule. “On-time” is when a trip departs a time point within a range of 0 minutes early to 5 minutes late. For SunLine to achieve targeted on-time performance, service running times need to be calibrated regularly based on existing conditions. SunLine has a relatively uncongested operating environment, which helps support a high KPI for on-time

performance. Some challenges to on-time performance are related to construction, heavy traffic, and passenger problems.

On-time performance standards for fixed routes are at a target of 85 percent (Figure 2-4).

**Figure 2-4 On-Time Performance Standard**

Service Mode	On-Time Performance Standards
Fixed Route Bus	85% (Excepting Major Detours)

**Runtime Variance:** Runtime is the time allotted in a transit schedule for a route to travel from one time point to another time point, or from beginning to end. Calibrating the runtime for the day of the week and hour of the day (for example, peak vs. non-peak) helps routes and the overall system adhere to or surpass the adopted on-time performance. It is important to review runtime variance regularly because roadway traffic conditions are ever-changing.

**Percent Service Completed:** Percentage of service completed is a metric established as of September 2017. The initial intention was to report percentage of trips completed; however, because of limitations in the Avail ITS system, the percentage of revenue mileage completed is reported.

This KPI measures service reliability as defined by the percentage of miles completed daily. Three components are necessary to successfully complete scheduled service:

- daily availability of operators to meet service demands
- daily availability of fleet vehicles to meet service demands
- miles between service interruptions

The set standard for service completed is 99 percent by service mode, as seen in Figure 2-5. The percentage of service completed for FY 24 was 97 percent of the approved level of service, exceeding SunLine’s minimum service standard.

**Figure 2-5 Service Completed Standard**

Percentage of Service Completed Service Mode	Service Completed Minimum Standard
Fixed route bus	99%

**Miles between Service Interruptions:** This KPI measures service reliability as defined by revenue miles between service interruptions, regardless of the cause. To meet this target, both avoidance of service interruptions through early identification (for example, planning for detours, proper fleet maintenance) and timely response to service interruptions that do occur are necessary. The set minimum target between service interruptions (road calls) is 5,000 miles, as seen in Figure 2-6.

**Figure 2-6 Miles between Service Interruptions Standard**

Miles between Service Interruptions Service Mode	Target Minimum Miles between Service Interruptions (Road Calls)
Fixed route bus	5,000

**Load Standards:** This service quality KPI establishes load standards for various vehicle types and is measured for each trip operated. While it may be acceptable for some riders to stand for short distances or time periods (for example, under 2 miles or 10 minutes) during peak periods, it is expected that seating should be available for all riders during normal off-peak conditions (Figure 2-7).

**Figure 2-7 Load Standards**

Load Standards Service Period	Maximum Consistent Load Factor
Peak	Average over 133% of seated load = 50 passengers
Off Peak	Average over 100% of seated load = 38 passengers

**Average Fleet Age:** The age of the vehicle fleet affects the performance and reliability of transit services and the attraction of customers. Adhering to the average fleet age requirement will ensure a consistently safe, reliable, and comfortable passenger experience (Figure 2-8).

**Figure 2-8 Average Fleet Age Standard**

Vehicle Average Age	Average Fleet Age
Standard Transit Bus	No greater than 10 years

**Bus Deployment Policy:** This policy specifies the kind of vehicle that should be used to operate individual routes. The type of vehicle deployed on a route depends primarily on ridership demand and trip loads (Figure 2-9). Using incorrectly sized vehicles on routes can unnecessarily add operating cost to a route or result in overcrowding.

**Figure 2-9 Bus Deployment Standard**

Bus Deployment	Vehicle Type
Trunk Bus Routes	40' Buses
Local Bus Routes	32' or 40' Buses - Based on ridership demand
Market-Based Services	MCI Coach

SunLine will review the Bus Deployment Policy every 2 years, beginning in 2018, and make necessary adjustments as the fleet is updated to ensure compliance with the Title VI requirements.

#### **2.1.4 Service Warrants**

The Warrants Standards provide guidelines for the introduction of new services. They are a tool for judging when new service or service extensions are appropriate. A new fixed route or route extension could be introduced when the ridership forecasts based on population, school enrollment, or job density are sufficient to achieve minimum passengers per revenue hour standards by service type. To ensure the agency's financial sustainability, SunLine will introduce only those new services that operate above the lower-performing route quartile or with productivity that is within 15 percent of the system average.

Planning new services around these guidelines will help ensure the successful performance of new routes. Providing a set of guidelines for which areas warrant all-day fixed route service will help SunLine respond to future community requests for new service.

#### *Evaluating New Services*

New routes should be monitored to determine whether they are reaching the desired performance standards. The route should first be evaluated after 6 months to determine whether it meets more than two-thirds of its performance standards. New services not meeting the minimum standards at the end of an 18- to 24-month trial period are subject to corrective action or discontinuation.

In some cases, trial periods for new services may vary based on the requirements of grant funding. For example, if a grant provided 3 years of funding for a route that did not meet standards, this route may still be operated for the full 3-year period.

#### **2.1.5 Paratransit Service Standards (SunDial)**

##### *Eligibility*

- Any person with a disability who is unable to board, ride, or disembark from an accessible vehicle without the assistance of another person is eligible.
- Any person with a disability who has a specific impairment-related condition that prevents the person from traveling to or from a boarding/disembarking location is eligible.
- Certification is based on individual's functional ability to ride the fixed route system.
- Visitors qualified elsewhere in the United States may use the SunDial ADA service for up to 21 days per year and must then qualify locally.
- A maximum 21-day response period for the application and an appeals process exists.
- There is no limit to the number of trips a person can make. Reservations can be made up to 7 days in advance.
- A no-show policy exists for passengers who do not appear for their rides, with possible exclusion from SunDial service for a period of time in extreme cases.

SunLine's Eligibility Department processed 100 percent of completed applications within the 21-day target.

### *Access*

- The agency must serve any origin and destination requests that are both within 0.75 miles of a fixed route corridor (excluding Commuter bus service) at the times and days of service when the fixed route is operating. Next-day service by reservation during regular business hours must be provided.
- The reservations call center accepts client reservations 7 days per week between 8:00 A.M. and 5:00 P.M. for next-day service.

### *Travel Time*

- Trip pick-up time must be scheduled within 1 hour before or after the requested pick-up time. Trip length should be comparable to the time it would take to make the same trip by the fixed route service.

### *On-time Performance*

- Trip pick up should consistently occur within a 30-minute window from the scheduled pick-up time.
- On-time performance is in accordance with FTA Circular 4710.1 to perform equivalent to SunLine's fixed route service. Paratransit continues to meet and exceed this goal.

### *Capacity*

- Subscription service is provided as a proportion of our total complementary paratransit service as long as it does not interfere with our capacity for demand trips.
- No more than 50 percent of the number of trips can be subscription. Going above this level could cause capacity constraints to serve our non-subscription riders.
- Staff ensures subscription trips are balanced with non-subscription trips to ensure adequate levels of service are provided on a daily basis.

### *Fares*

- Fares charged may not exceed twice the non-discounted fare for the fixed-route network at the time of the trip.
- No fare is to be charged to personal care attendants where they are required.
- Companions pay the same ADA fare.
- SunDial fares are based on travel within one city or multiple cities. Within one city the fare is \$1.50 per trip; travel within multiple cities is \$2.00 per trip.

## **2.2 Description of SRTP Performance Report**

### *Service Design*

The transit routes and the cities or communities they serve are listed below in Figure 2-11. Figure 2-12 and \*Service runs 6:30 AM – 11:30 AM and 2:10 PM – 7:30 PM.

Figure 2-12 communicate the current frequency and service spans, respectively, for each route.

**Figure 2-10 Summary of Fixed Route Transit Services**

Route	Cities/Communities Served
1WV	Palm Springs, Cathedral City, Rancho Mirage
1EV	Palm Desert, Indian Wells, La Quinta, Indio, and Coachella
2	Desert Hot Springs, Palm Springs, and Cathedral City
3	Desert Hot Springs and Desert Edge
4	Palm Springs, Cathedral City, Rancho Mirage, Thousand Palms, and Palm Desert
5	Desert Hot Springs and Palm Desert
6	Palm Desert, Indian Wells, La Quinta, Indio, and Coachella
7	La Quinta, Palm Desert, Indian Wells, and Bermuda Dunes
8	Indio, Coachella, Thermal, and Mecca
9	Mecca and North Shore
10	Indio, Palm Desert, Beaumont, and CSUSB

**Figure 2-11 Service Frequencies, in Minutes**

Route	Weekday Frequency	Weekend Frequency
	All Day	All Day
1WV	30	30
1EV	30	30
2	30	40
3	30	60
4	60	60
5	60*	NS
6	60*	NS
7	45	90
8	60	60
9	60	60
10	Select trips	NS

\*Service runs 6:30 AM – 11:30 AM and 2:10 PM – 7:30 PM.

**Figure 2-12 Service Spans**

Route	Weekday Span		Weekend Span	
	Start	Finish	Start	Finish
1WV	5:00 A.M.	10:14 P.M.	5:00 A.M.	10:14 P.M.
1EV	5:00 A.M.	10:48 P.M.	5:00 A.M.	10:48 P.M.
2	5:00 A.M.	10:56 P.M.	5:00 A.M.	10:46 P.M.
3	6:45 A.M.	8:35 P.M.	6:45 A.M.	8:35 P.M.
4	6:10 A.M.	9:50 P.M.	6:10 A.M.	9:50 P.M.
5 (AM)	6:10 A.M.	9:00 A.M.	NS	NS
5 (PM)	3:00 P.M.	6:51 P.M.	NS	NS
6 (AM)	6:00 A.M.	11:46 A.M.	NS	NS
6 (PM)	2:00 PM	7:45 PM	NS	NS
7	5:10 A.M.	9:20 P.M.	5:10 A.M.	9:20 P.M.
8	5:30 A.M.	10:57 P.M.	5:35 A.M.	10:57 P.M.
9 (AM)	6:00 A.M.	9:45 AM	6:00 A.M.	9:45 P.M.
9 (PM)	2:00 P.M.	7:45 P.M.	2:00 P.M.	7:45 P.M.
10 (AM)	5:20 A.M.	2:00 P.M.	—	—
10 (PM)	12:50 P.M.	8:00 P.M.	—	—

## Ridership

Ridership system-wide in FY 23-24 for SunBus, SunDial, SunRide and SolVan was a total of 2,753,390 boardings, an increase of 1.9 percent compared with FY 22-23:

- **SunBus** ridership totaled 2,585,789, an increase of 26,360 rides or 0.01%, in comparison to FY22-23.
- **SunDial** ridership totaled 119,492, an increase of 9,338 rides or 8.5%, in comparison to FY22-23.
- **SolVan** ridership totaled 23,738, an increase of 3,766 rides or 18.8%, in comparison to FY22-23.
- **SunRide** ridership totaled 22,435, an increase of 13,313 rides or 145.9%, in comparison to FY22-23.

**Figure 2-13 5-Year Fixed Route Ridership Comparison**

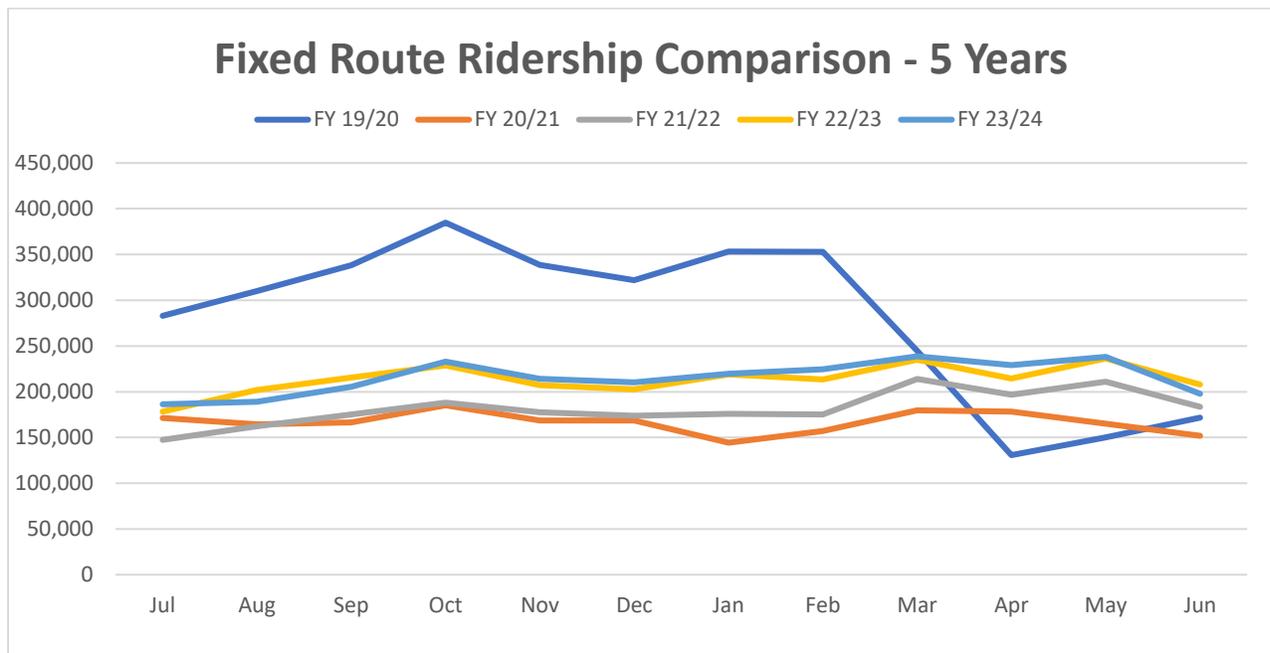
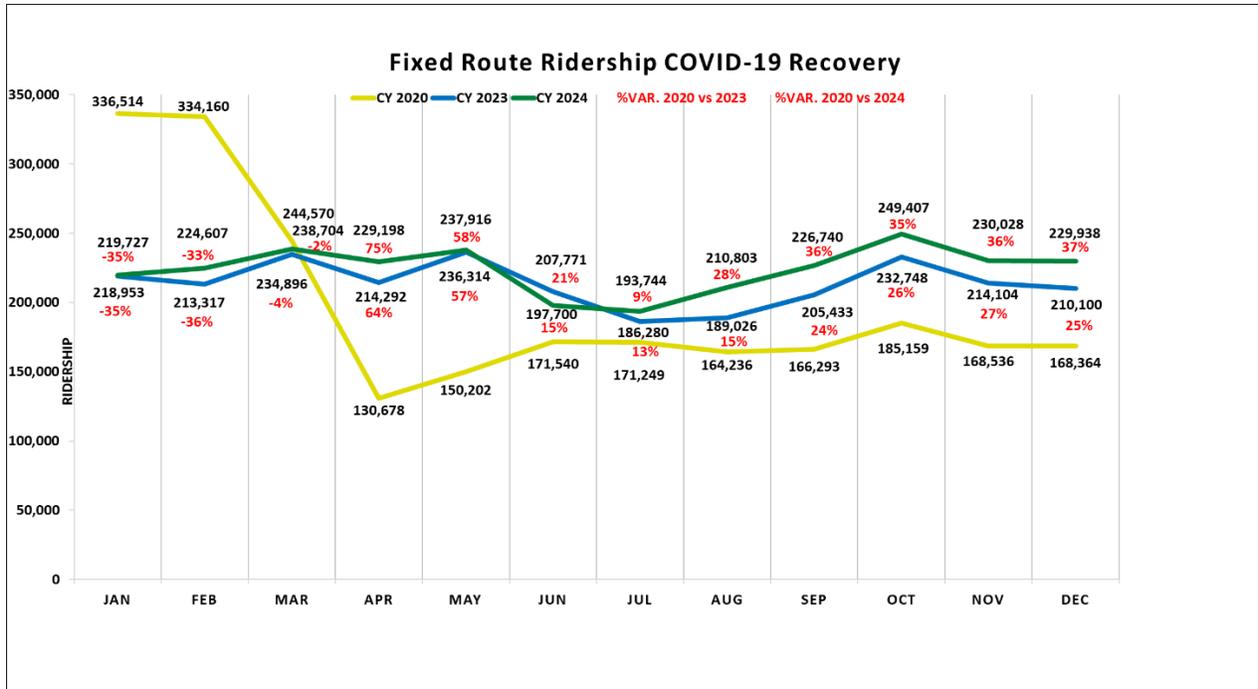


Figure 2-15 shows our COVID-19 recovery chart, showing detailed changes in ridership for calendar years 2020, 2023 and 2024.

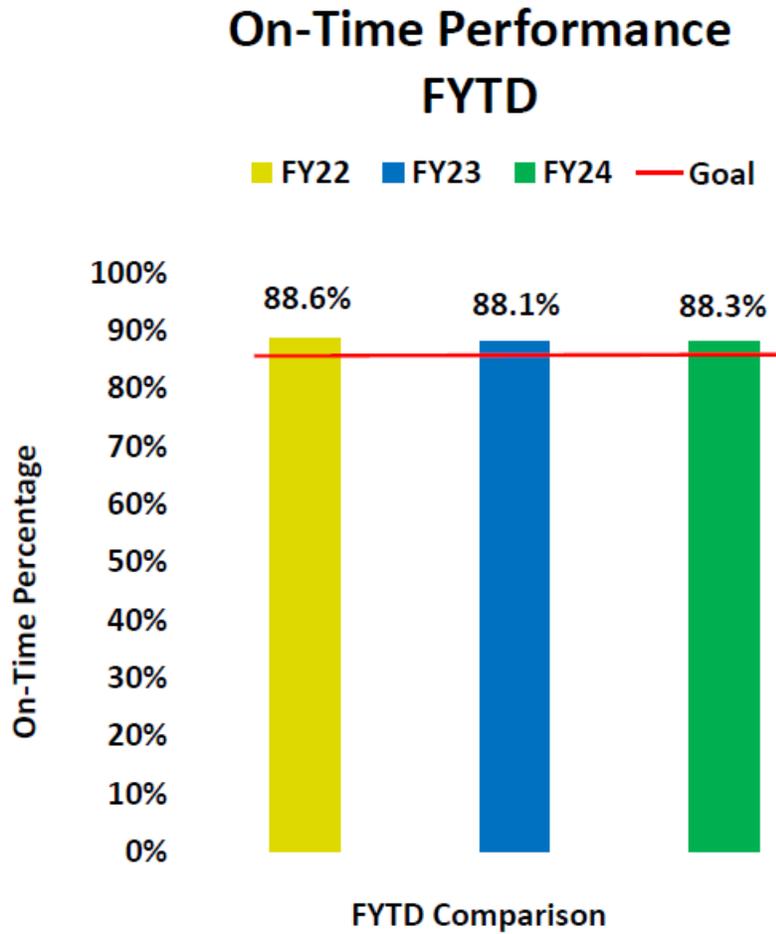
Figure 2-14 COVID-19 Impact on Fixed Route Ridership



*Paratransit Performance*

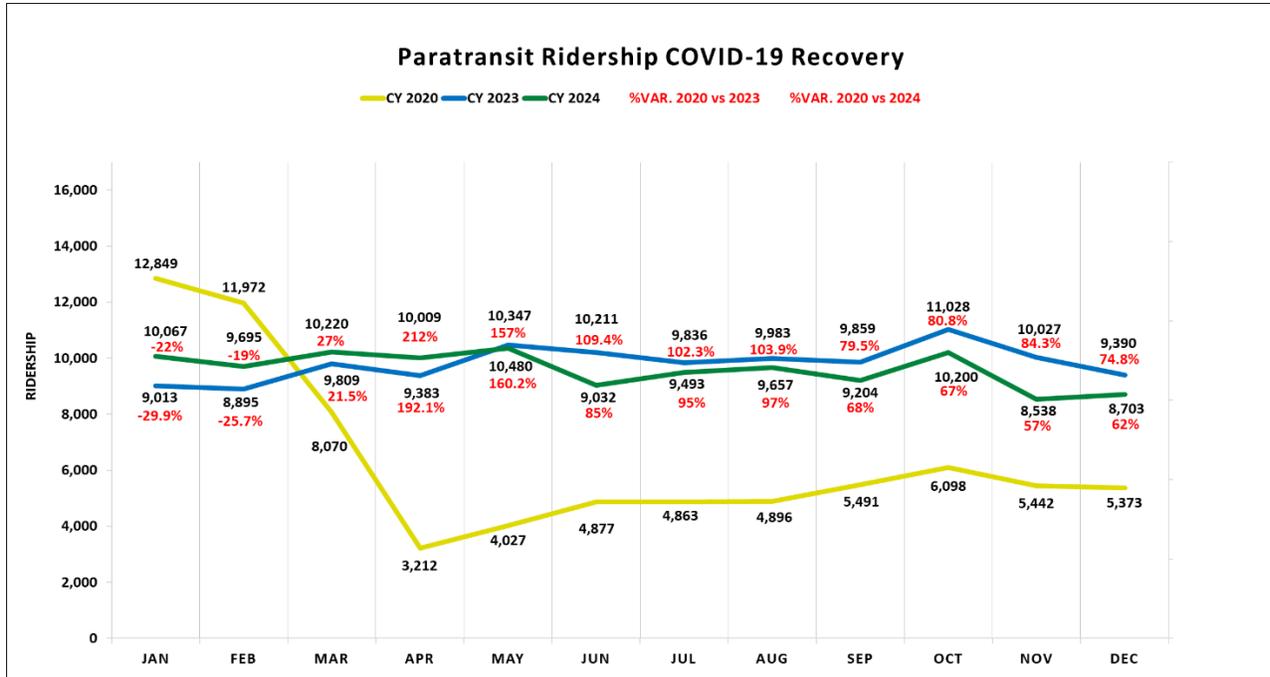
Figure 2-16 shows SunDial's on-time performance for FY 2022 to FY 2024.

*Figure 2-15 SunDial On-Time Performance for FY 2022 to FY 2024.*



Paratransit had a 8.48% increase in ridership when comparing FY22/23 to FY23/24. The chart below displays ridership over calendar years. May 2024, paratransit had its highest ridership of 10,480. (Figure 2-16).

**Figure 2-16 Paratransit Ridership COVID-19 Impact for FY 22-23**



## 2.2.8 Route-level Performance

### Productivity

Figure 2-17 indicates that neither of the two trunk routes (Routes 1 and 2) met their performance standards in FY 24.

**Figure 2-17 Trunk Routes Average**

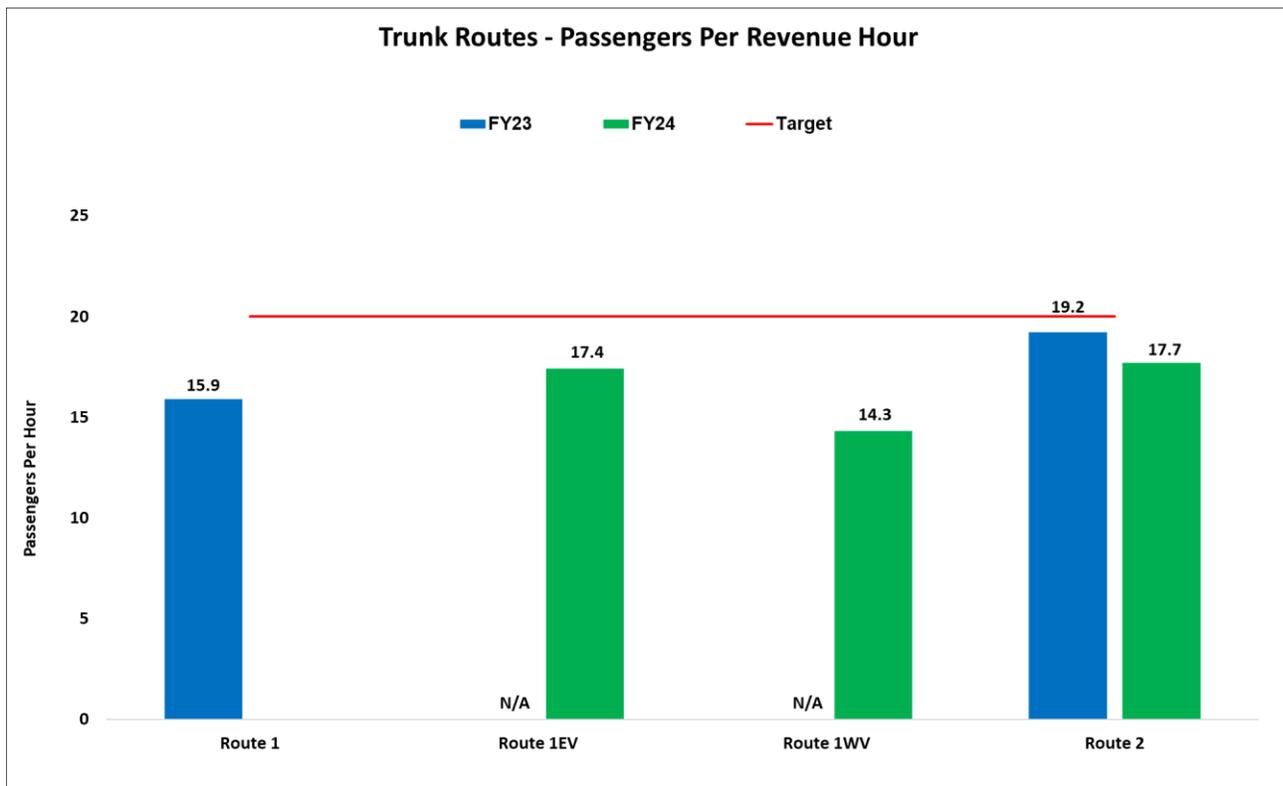
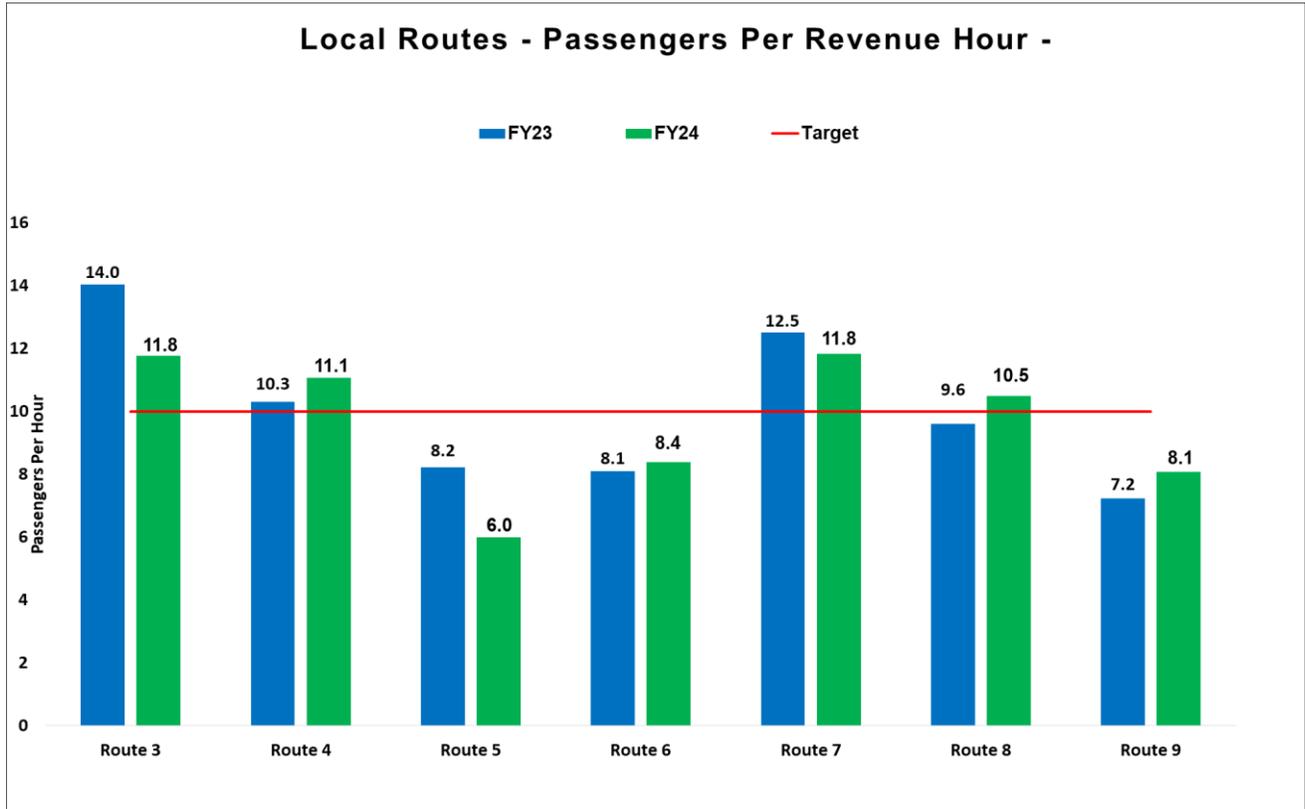


Figure 2-20 indicates that three out of the seven local routes met their performance standards goal:

- For FY22-23, Routes 3, 4, 7 and Route 8 met the target of 10 passengers per revenue hour.
- For FY22-23, Routes 5, 6, and 9 failed to meet the target of 10 PPRH.

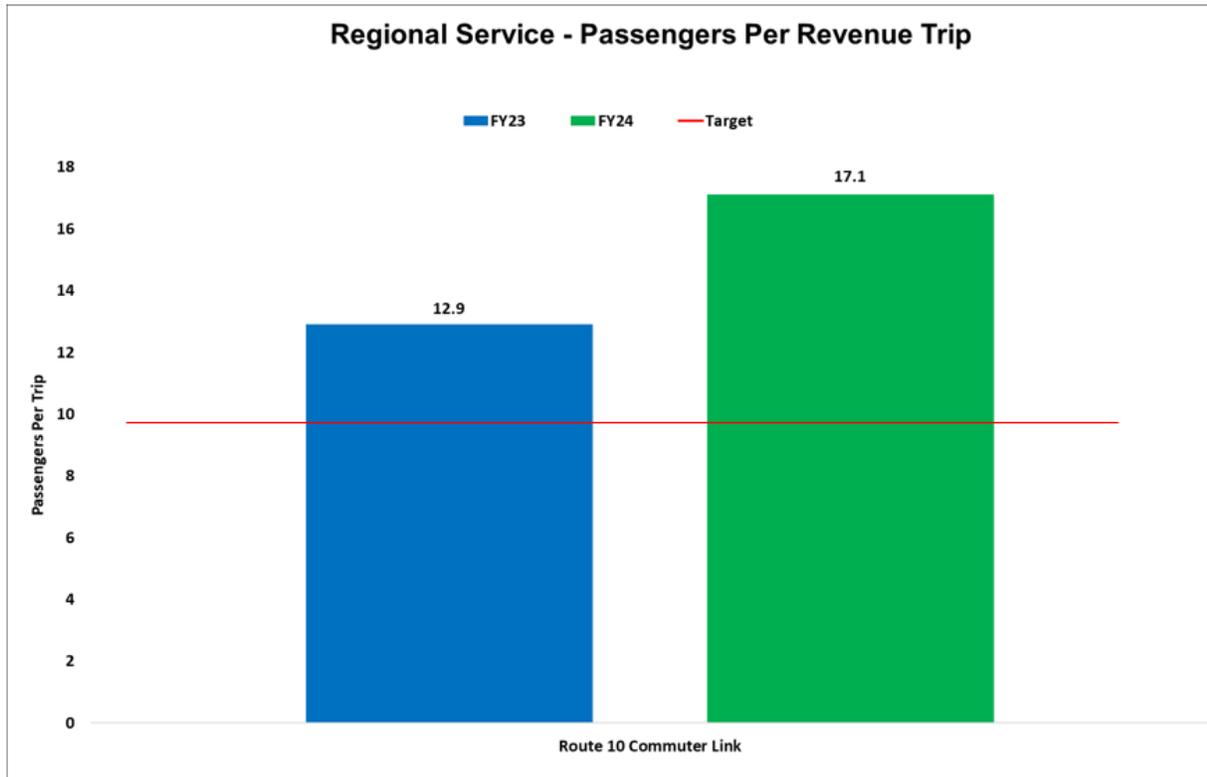
Figure 2-18 Local Routes Average



Route 10 Commuter Link service started revenue service in July 2022 and is currently meeting its goal of 10 passengers per revenue trip (

Figure 2-19).

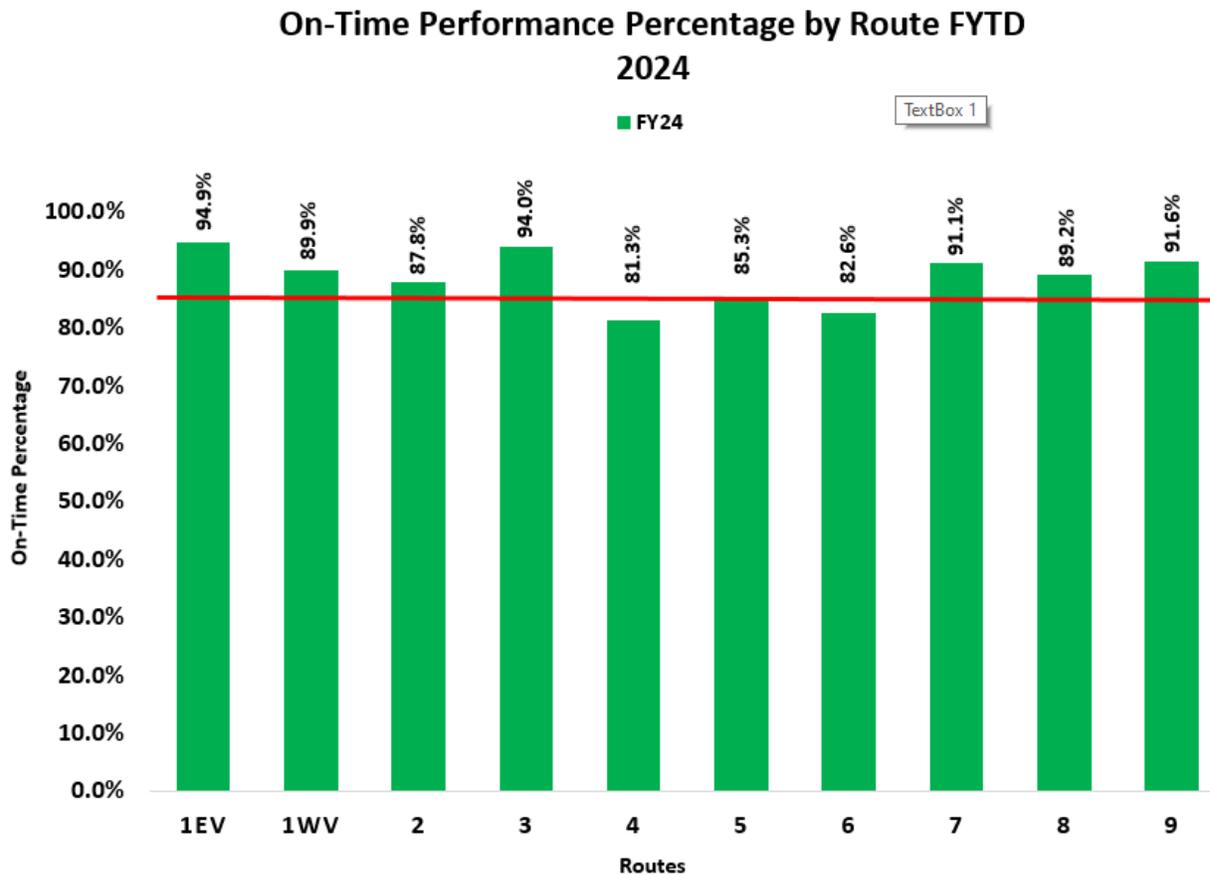
Figure 2-19 Market Based Service Average



Service Quality

**On-time Performance:** SunLine’s system-wide on-time performance is at 84 percent for July 1, 2022, to June 30, 2023. The Agency did not meet its goal for FY 23/24 with an OTP of 89.2%. Routes 1EV, 1WV, 2, 3, 5, 7, 8, 9 met the minimum on-time performance standard as captured in Figure 2-20.

Figure 2-20 On-Time Performance, by Route



On-Time: When a trip departs a time point within range of zero (0) minutes early to five (5) minutes late.

**Average Fleet Age:** The fixed route fleet is made up of 49 buses and supported with a contingency fleet of 39 CNG/RNG buses. The contingency fleet is required to ensure service reliability as SunLine implements hydrogen fuel cell buses. New zero emission technologies present new challenges that require time and experience to understand. SunLine continues to replace buses in the fleet that have met their useful life.

*Figure 2-21 Active Fixed Route Fleet*

Bus Model Year	Number of Buses	Fuel Type	Bus Type
2014	3	Hydrogen	40' heavy-duty
2015	1	Hydrogen	40' heavy-duty
2017	1	Hydrogen	40' heavy-duty
2018	9	Hydrogen	40' heavy-duty
2018	4	Electric	40' heavy-duty
2020	2	CNG	45' over-the-road
2020	10	CNG	40' heavy-duty
2021	6	Hydrogen	40' heavy-duty
2022	4	Hydrogen	40' heavy-duty
2022	1	CNG	45' over-the-road
2024	8	Hydrogen	40' heavy-duty
<b>Total</b>	<b>49</b>		

**Bus Deployment:** SunLine is in full compliance with Title VI, which protects people from discrimination based on race, color, and national origin in programs and activities receiving federal financial assistance. SunLine ensures equitable distribution of its assets in delivery of transit services to the people of the Coachella Valley.

Buses are assigned according to successful completion of maintenance functions without regard to route assignment, or vehicle age, except in size considerations as outlined in the Bus Deployment Policy described previously. Additionally, fuel cell buses and battery electric buses are assigned to routes with shorter distances and/or durations that are within the acceptable range capacity of those vehicles.

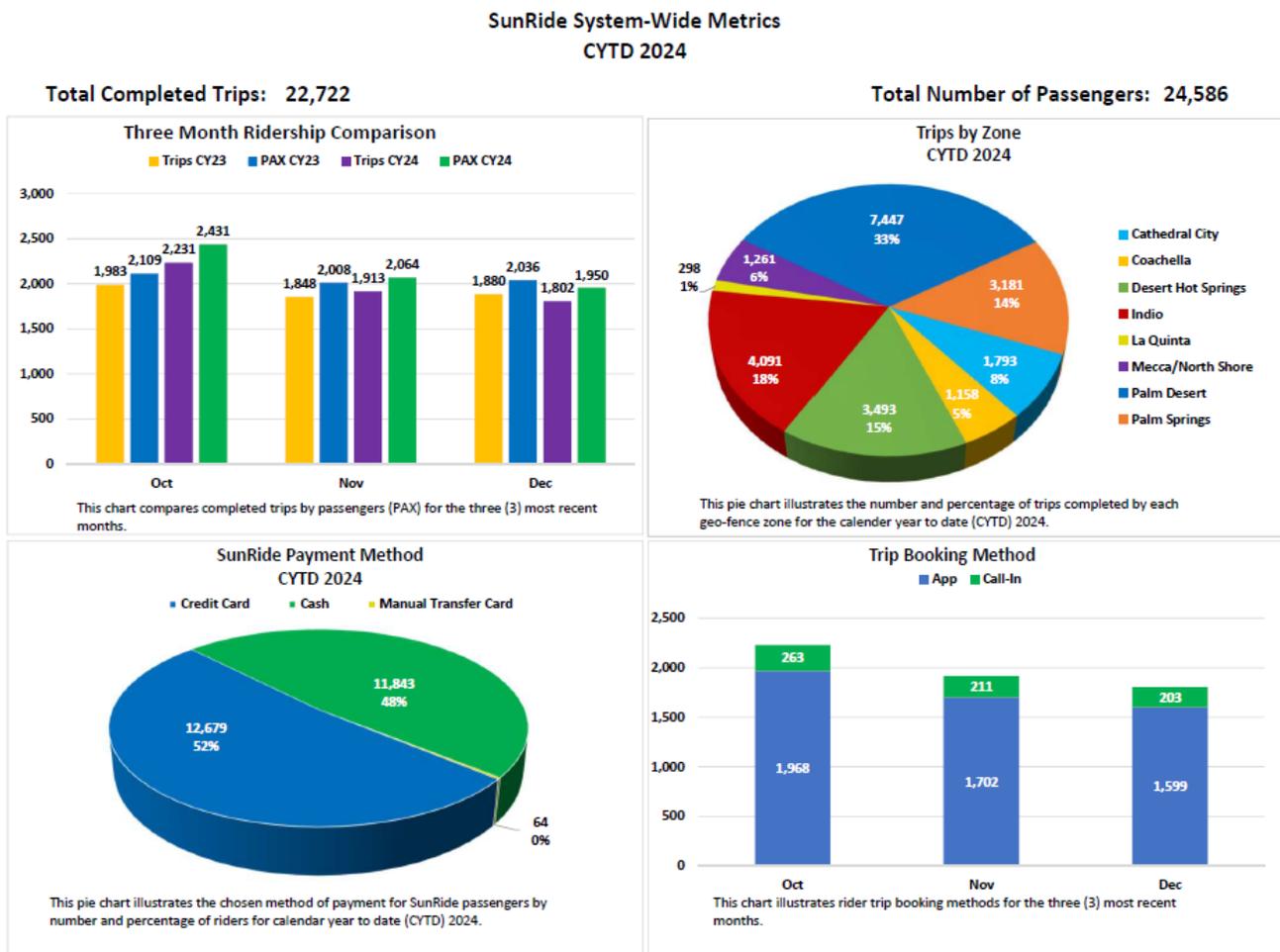
Adequate numbers of buses are assigned to routes with high demand to avoid instances of overcrowding or standing passengers. All SunLine buses are fully air-conditioned and are 100 percent accessible to persons with disabilities.

- Routes 1, 2, 3, and 4 should use 40-foot buses given the higher passenger volumes.
- Other routes should use either 40- or 32-foot buses based on ridership demand.

### SunRide Service Performance

Figure 2-22 to **Error! Reference source not found.** show key performance metrics for SunRide during calendar year 2024.

**Figure 2-22 SunRide System-wide Metrics**



Percentage of Trips System-wide as Ridesharing: 27%.  
[Based on No. of Shared Rides for the month (492) divided by Total Trips Completed (1,802)].

## **2.3 Productivity Improvement Efforts Underway**

SunRide has grown as a microtransit program from connecting riders to fixed route service by bridging the first mile, last mile gap, to including virtual stops within each geo-fence. Virtual stops consist of medical facilities, pharmacies, banks, grocery stores, educational facilities, and community services, such as libraries and senior centers. SunRide has entered a new phase using VIA as a turnkey solution. VIA and SunLine will undergo a service evaluation to improve how the service performs.

SunLine has partnered with Transit App to bring a universal solution to riders. Transit App is a globally used trip planning and payment app that brings convenience to riding public transit. Transit app's multiagency trip planning solution allows riders to identify new transit solution out of the Coachella Valley and into the greater LA County region.

SunLine will be conducting a Comprehensive Operational Analysis (COA) in FY 26 to evaluate and improve the effectiveness of its transit network. This in-depth study will assess current rider needs and explore strategies to attract new riders. Key questions the COA will help answer include: Does my bus go where I need it to go? Does it operate when I need it? And does it come often enough to meet my needs? The results will guide future service planning to ensure SunLine's system is efficient, equitable, and responsive to the communities it serves.

## **2.4 Major Trip Generators**

The 2019 SunLine Transit Agency Rider Survey identified the main transit trip generators in the Coachella Valley. The top destinations for home-based work trips are Palm Springs, Palm Desert, and La Quinta. The College of the Desert and Palm Springs High School are top destinations for home-based other trips that include shopping, recreation, and education. SunLine's service design should focus on serving major trip generators and creating convenient, direct linkages between origins and destinations.

## **2.5 Recent Service Changes**

SunLine typically implements service changes in January, May, and September in agreement with the MOU. These service changes are driven by experiences learned from previous adjustments, evolving passenger needs, assessments of service effectiveness, and other factors impacting service quality. The following changes occurred in FY24 and through the third quarter of FY25:

**Figure 2-1** Recent Service Changes

Service Changes	
Date	Description
September 2023	<ul style="list-style-type: none"> <li>The last westbound trip on the 10 Commuter Link is now scheduled to begin at 3:50 PM instead of 2:50 PM to better accommodate CSUSB's bell schedule.</li> </ul>
January 2024	<ul style="list-style-type: none"> <li>Routes 1WV, 1EV, and 2 operate every 30 minutes, seven days a week.</li> <li>Route 3 operates every 30 minutes on weekdays and every 60 minutes on weekends.</li> <li>Minor schedule adjustments to Routes 5 and 6, which continue to operate on weekdays only.</li> <li>Route 7 operates every 45 minutes on weekdays and every 90 minutes on weekends.</li> </ul>
September 2024	<ul style="list-style-type: none"> <li>Routes 1EV, 6, and 8 no longer stop at 5<sup>th</sup> and Vine in Coachella. The new stop is at the Coachella Transit Hub on 4<sup>th</sup> at Cesar Chavez.</li> <li>Route 2 operates every 30 minutes, seven days a week. Northbound trips depart nine minutes earlier from B St. and Buddy Rogers.</li> <li>Route 4 operates every 60 minutes, seven days a week. Eastbound trips depart 5 minutes later, starting from El Cielo and Kirk Douglas.</li> <li>Route 5 has minor schedule adjustments and continues to operate on weekdays only.</li> <li>Route 10 Commuter Link adds a new stop at the Thousand Palms Transit Hub on Varner at Harry Oliver Trail. Starting September 3 the westbound trips depart 10 minutes earlier.</li> <li>200 Tripper starts service 10 minutes earlier, departing West and Pierson in Desert Hot Springs at 7:30 AM.</li> </ul>
January 2025	<ul style="list-style-type: none"> <li>Route 1WV has a new timepoint stop for eastbound trips at Palm Canyon and Baristo. The schedule was slightly adjusted to make it easier for passengers to transfer to Route 2.</li> <li>Route 1EV has a few minor schedule changes to enhance service reliability and efficiency.</li> <li>Route 2 schedule was slightly adjusted to facilitate passenger transfers to Route 1WV at Indian Canyon and Ramon on northbound trips.</li> <li>Route 4 has a new timepoint stop at Ramon and Sierra del Sol at 3:52 pm (only at that time on weekdays) to allow students to arrive at the stop closest to Rancho Mirage High School.</li> <li>Route 7 southbound trips now depart ten (10) minutes earlier, starting from Harris Lane at Washington Street.</li> <li>Route 10 Commuter Link has a new stop added at the Indio Transportation Center on Indio Boulevard at the Transportation Center.</li> </ul>

	<ul style="list-style-type: none"> <li>• Route 200 Tripper now starts service one (1) minute earlier, departing from West and Pierson in Desert Hot Springs at 7:29 a.m.</li> </ul>
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## 2.6 Community and Stakeholder Engagement

SunLine Transit Agency organizes annual events and actively participates in various community gatherings and outreach programs. These efforts are essential for fostering relationships not only with riders and community members but also with other organizations. Below is a list of key events hosted by SunLine, as well as those we attended in collaboration with other organizations from January 2024 to January 2025:

- Internal SunLine Events for Employees:
  - We Love our Employees
  - National Transit Employee Appreciation Day
- Valley-Wide Mass Casualty Drill
- Salvation Army’s Annual Veterans and Community Expo
- Professional Vehicle and Touch a Truck Days at Schools and the Cathedral City Hot Air Balloon Festival
- Community Outreaches: Migrant Resource Fair, Family Resource Fairs in Multiple Cities, Family Days, Día del Niño/Day of the Child Events, etc.
- SunLine’s Youth Sustainability Committee Earth Day Event at the Palm Desert Farmer’s Market
- California State University of San Bernardino Transit Expo
- Annual Valley Wide Employment Expo
- Healthy Desert, Healthy You Environmental Health Summit
- Parades: Palm Desert Golf Cart Parade, President’s Day Parade, Mecca Desfile de Luces (Lights Parade)
- American Heart Association’s Coachella Valley Heart & Stroke Walk
- External SunLine Events:
  - SunLine’s Annual Pack the Bus
  - SunLine’s Coachella Transit Hub Ribbon Cutting
  - SunLine’s Liquid Hydrogen Station Ribbon Cutting
  - SunLine’s Haunted Bus
  - SunLine’s Annual Fill the Bus
  - SunLine’s Student Art Contest

### 2.6.1 Access Advisory Committee

In June 1996, the Board of Directors established the Access Advisory Committee to assist staff in an advisory capacity on accessibility and senior mobility concerns. This input was especially valuable in the early years as SunLine Transit Agency (SunLine) structured its fixed route and paratransit services to comply with ADA requirements.

As determined by the Board of Directors, the Committee serves as a vital forum for advising SunLine on the planning and implementation of its fixed-route and paratransit services. The Committee reviews, comments on, and provides feedback to SunLine staff in order to make transportation more accessible for everyone. Membership is designed to include individuals with



diverse expertise and firsthand experience with SunLine's services, strengthening the Committee's ability to offer well-informed recommendations. The Committee complies with California's open meeting law, the Brown Act, and follows Robert's Rules of Order to ensure structured and effective discussions.

All members of the Committee serve at the pleasure of the SunLine Board of Directors and in a voluntary capacity. The Committee includes fifteen (15) seats. Any person living within SunLine's service area may be appointed to the Committee, and the Committee includes individuals who regularly utilize SunLine's transit services. Currently, five (5) of the fifteen (15) seats are filled.

# CHAPTER 3

Future Service Plans,  
Fare Changes, Capital  
Planning & Marketing



FY26-28 SHORT-RANGE  
**TRANSIT PLAN**

### 3.1 Planned Service Changes FY 2026 to FY 2028

SunLine is actively exploring ways to leverage its existing resources to increase service where needed which would notably reduce the headway during weekdays from 30 minutes to 20 minutes on select routes. SunLine has previously faced challenges in hiring a sufficient workforce and obtaining the necessary fleet to meet the demands to increase service levels. However, as resources become available, the intent is to follow through with deploying that level of service. There is the possibility of implementing a higher level of service incrementally to continue the goal of improving service without exhausting resources.

**Figure 3-1** Fixed Route Service Levels

		Effective January 7, 2024		
		Weekday	Saturday	Sunday
1WV	Palm Desert Mall - Palm Springs	30	30	30
1EV	Coachella - Palm Desert Mall	30	30	30
2	Desert Hot Springs - Palm Springs - Cathedral City	30	30	30
3	Desert Edge - Desert Hot Springs	30	60	60
4	Palm Desert Mall - Palm Springs	60	60	60
5	Desert Hot Springs - CSUSB Palm Desert - Palm Desert Mall	60	NS	NS
6	Coachella - Via Fred Waring - Palm Desert Mall	60	NS	NS
7	Bermuda Dunes - Indian Wells - La Quinta	45	90	90
8	North Indio - Coachella - Thermal/Mecca	60	60	60
9	North Shore - Mecca - Oasis	60	60	60
10	Indio - CSUSB-PDC - CSUSB - San Bernardino Transit Center (SBTC)/Metrolink	4 round trips	NS	NS

NS: No Service

### **3.1.1 Fixed Route Future Service Changes**

SunLine Transit Agency conducts a service change three times per year in accordance with the Collective Bargaining Agreement with the ATU Local 1277. These service changes go into effect on the first Sunday of January, May, and September.

Planning staff, using feedback and input from Operations staff and the community, use the Service Change activity to make adjustments to the fixed route system.

#### *Comprehensive Operational Analysis*

SunLine Transit Agency will undertake a Comprehensive Operational Analysis (COA) that will span Fiscal Years 2026 and 2027. The primary objective of the COA is to evaluate existing service and provide strategic recommendations for the future design of the transit network. The findings and recommendations from the COA will serve as a critical planning tool, guiding staff in implementing service improvements and system changes that align with the agency's long term goals and the evolving needs of the Coachella Valley community.

### **3.1.2 Fixed Route Service North of I-10**

As development in the Coachella Valley continues to expand, the area north of I-10 has been identified as having a service gap. The proposal for a new fixed route, Route 17, aims to connect the existing terminal points of Routes 7 and 8 in Bermuda Dunes and Indio, respectively. Introducing Route 17 will create a new connection between Bermuda Dunes and Indio, reduce overall travel time for passengers, open up new destinations, and ultimately making the system more efficient and accessible. Implementing a new route is considered a Major Service Change and, therefore, requires a public engagement process and final approval from the Board of Directors.

### **3.1.3 Other Improvements**

Looking ahead, SunLine is evaluating the possibility of splitting Route 4—which currently operates between Palm Desert and Palm Springs—into two shorter, more manageable routes. This change would reduce the total travel distance and is intended to improve service reliability.

Additionally, SunLine's updated ICT Plan or Fleet Replacement Plan will outline how the agency intends to transition to clean fuels, considering the current availability of zero-emission vehicle models.

The upcoming OnBoard Ridership Survey will provide valuable insights into who is riding the system and how they are using it. This data will support leadership in making informed decisions to enhance service and better meet rider needs.

### **3.1.4 SunRide Future Service Plans**

SunLine and Via are conducting a comprehensive evaluation of the microtransit service to identify opportunities for improved efficiency, performance, and rider experience. The review process begins with collecting and analyzing service data, including ridership trends, wait times, trip fulfillment rates, and vehicle utilization. Feedback from riders, drivers, and staff will be gathered to inform a well-rounded assessment. The evaluation will also examine service coverage,

accessibility, and how well the microtransit system integrates with SunLine's fixed-route network. Key performance indicators such as cost per trip, shared ride percentage, and on-time performance will be analyzed against industry benchmarks. Based on the findings, SunLine and Via will develop targeted recommendations to enhance service delivery and ensure the system continues to meet the evolving needs of the Coachella Valley. An ongoing monitoring plan will follow to measure progress and guide future improvements.

### **3.1.5 SunDial Future Service Plans**

The provision of ADA services remains a challenge because it is costly. Efforts to mitigate the increasing expenses in demand-responsive service include revisions to the paratransit eligibility/certification process and continuing to monitor late cancellations and no-shows, which improves the availability of appointment time slots and makes SunDial service more efficient for customers. SunDial staff periodically (monthly) measure the system wide average rate for that month to determine whether a particular customer has excessive late cancellations or no-shows. They then consider the customer's overall frequency of use and evaluate whether there is "a pattern of abuse" relative to how often that customer travels with SunDial.

## **3.2 Future Marketing Plans, Studies, Promotion, or programs to promote ridership**

To support the initiatives outlined in the SRTP, the Marketing Department will focus on the following key areas:

1. Help regain and build ridership among current, recent, and lapsed riders through seasonal campaigns
2. Identify and drive ridership among new riders
3. Build trust among stakeholders and the community to drive advocacy
4. Communicate SunLine's efforts in maintaining and continuing to improve on-time performance
5. Communicate SunLine's efforts and role in supporting job creation in the private sector, as well as for local businesses by highlighting how public transit helps connect people to employment opportunities and essential destinations
6. Convey progress made in SunLine's clean fuels fleet initiatives
7. Collaborate across departments to help improve customer experience for passengers and elevate SunLine's brand
8. Explore new ways to engage with the community through various community outreach event opportunities and community partnerships

### **3.2.1 Target Audiences**

For marketing efforts to resonate, analysis of target markets must be done, studying both who they are and what motivates them. Then, marketing materials must be customized to reach those target audiences. See Figure 3.2 for target audience analysis.

**Figure 3-2** Target Audience Analysis

	<b>Key Messages</b> <b>What motivates them?</b>
Current riders	<ul style="list-style-type: none"> <li>• On-time performance</li> <li>• Wait time between buses (headway time)</li> <li>• Cleanliness</li> <li>• Safety</li> <li>• Price</li> </ul> <p>For some: environment</p>
Potential new riders	<ul style="list-style-type: none"> <li>• Ability to multitask</li> <li>• Cleanliness</li> <li>• Safety</li> <li>• On-time performance</li> <li>• Wait time between buses (headway time)</li> <li>• Price</li> <li>• Technology friendly facilities (i.e.: Wifi, chargers on buses, various payment methods like tap payment, etc.)</li> </ul> <p>For some: environment</p>
Community at large	<ul style="list-style-type: none"> <li>• Economic prosperity</li> <li>• Reduced congestion</li> <li>• Reduced emissions</li> <li>• Transparency</li> <li>• Community relationships</li> <li>• Good environmental stewards</li> </ul>
Employees	<ul style="list-style-type: none"> <li>• Feeling valued and heard</li> <li>• Having the opportunity to contribute to the Agency's success</li> <li>• Compensation and benefits</li> <li>• Cleanliness in office/bus</li> <li>• Transparency</li> </ul>

### **3.2.2 Marketing Strategies**

There are several strategies for communicating with SunLine’s diverse target audiences, and messaging will be customized to engage each group based on their motivations identified in the target audience analysis.

### **3.2.3 Social Media and Website**

After developing a strong social media program in recent years, SunLine has enhanced direct communication with its target audiences (fans and followers of the Agency’s social media platforms). The posts have been both entertaining and informative, emphasizing short-format videos and reels – two key components of keeping followers engaged.

Transit Tuesdays is a monthly live event on social media that discusses pre-selected topics and shares important updates with riders. Other social media posts tie in history, education, places to visit, comedy, safety, and recognition. This variety in messaging keeps the social platform accounts interesting and worth following.

A newly redesigned website will be released before the end of the FY25 fiscal year. The re-design takes into account highlighting information that is necessary to have front and center, thus allowing website visitors to find that information instantly. The new website also follows new web trends and practices and provides an easier pass purchase experience.

### **3.2.4 Advertising**

By strategically utilizing SunLine’s budget, we will develop and implement an advertising plan that maximizes available funds and incorporates innovative strategies. This plan will use various platforms, including digital, print, radio, streaming, and TV media. Additionally, the goal is to promote all key messaging through agency-owned and maintained advertising mediums, such as bus shelters, interior bus displays, and announcements.

### **3.2.5 Rider/Community Input**

A strong marketing program incorporates a strategy for listening to constituents. SunLine will create and facilitate surveys to gather input regarding major service changes and how they are being received in the community. This provides the opportunity to learn about any issues that may need to be addressed. Data gathered can be used with all appropriate departments to help improve the customer experience.

### **3.2.6 Public Relations**

SunLine’s public relations representatives will draft press releases to promote Agency initiatives. They will also pitch stories to the media to publicize key newsworthy items, coordinate media interviews, and follow up on media requests in a timely fashion.

### **3.2.7 Customer Service Center/Website**

SunLine’s Customer Service Center features LiveChat on the web for those who need immediate assistance or prefer a chat-based interface for convenience. The website also serves as a central resource for all communications and announcements from SunLine. Additionally, the Customer

Service Center provides phone support by customer service representatives Monday through Friday. Agents can utilize resources such as Google Transit Trip Planner and the Transit app to address customer inquiries quickly and accurately. Bilingual customer service agents are available to assist with questions in English and Spanish. Interpretation services for all other languages, including American Sign Language, are offered through our contract with LanguageLine. An interpreter can be accessed via phone, video, or through their app.

### **3.2.8 Video Production**

The Agency will continue to focus more on creating videos as marketing tools, in response to shifts in social media audience preferences. By developing an expanded library of video assets, SunLine will be able to drive greater engagement with its target markets, and those individuals will better retain the information shared through unique videos. The Marketing Department will also explore opportunities to produce longer video features, such as those created to recap the Student Art Contest event and the Youth Sustainability Advisory Committee Earth Day videos, where possible.

### **3.2.9 Rider's Guide**

The Rider's Guide has become an essential communication tool for SunLine. The Agency has maintained the layout of this revamped guide, which has proven to be a more user-friendly format. It features relevant information for riders that includes directions, maps, timepoint bus stop locations, schedules, fares, transfer instructions, and guidance on how to receive assistance with SunLine's programs and services. Transit system information, which aligns with the updated Rider's Guide, can also be found at transit hubs, on buses, at bus stops, and in community gathering locations. SunLine's system information is provided in both English and Spanish.

### **3.2.10 Clean Fuels Fleet Communications**

The Agency's reputation as a pioneer in clear air and alternative fuel technology must continue to stay top-of-mind by promoting news about SunLine's advancements in its Zero-Emissions Bus Rollout Plan. SunLine's new liquid hydrogen station has delivered increased reliability in fueling the Agency's Hydrogen Fuel Cell technology fleet. The addition of SunLine's upcoming public hydrogen station further reinforces this message by providing community members and visitors the chance to fuel their zero-emission hydrogen vehicles at SunLine.

### **3.2.11 Internal Communications**

Keeping employees informed about company initiatives and marketing efforts boosts morale and encourages their participation in the larger vision. To this end, SunLine will hold town hall meetings and has relaunched its internal newsletter, which features key stories and facts about the Agency's latest initiatives. In line with our strategic plan, a key component of the newsletter and town hall meetings is educating staff on how our Agency operates. Examples of topics include the different types of funding we receive, eligible uses for various funding sources, and how we gather data for planning our services. These efforts help enhance communication with the employee target audience segment, making SunLine Transit Agency an even better place to work.

### **3.2.12 Building an Effective Marketing Plan**

All the tools mentioned above will be used to market SunLine as a leader in transportation, innovation, and alternative fuel technology. As stated, targeted messaging and the use of effective platforms and strategies will be crucial for increasing ridership, rebuilding trust, communicating progress, and engaging employees.

### **3.2.13 Community Outreach**

SunLine works with local organizations, businesses, government agencies, and non-profit organizations to promote SunLine programs and services. Community outreach involves grassroots organizations to identify unmet transit needs and build community-based marketing partnerships. Historically, SunLine invests in these relationships by participating in community events such as mobility workshops, food drives, school supply drives, fundraisers, parades, and special event activities.

### **3.2.14 Community/Local Partnerships**

SunLine Transit Agency recognizes the importance of building strong partnerships with organizations that share our values and align with our mission of fostering a healthier community. Some organizations we currently collaborate with include the American Heart Association and the Ophelia Project at the John F. Kennedy Foundation. The American Heart Association focuses on heart health and community education to promote overall well-being—a mission that closely aligns with SunLine's commitment to enhancing public health through accessible transportation. Similarly, the Ophelia Project empowers young women, and SunLine supports this mission by providing essential public transit education, ensuring that they and other youth in our community gain valuable life skills for independence and mobility.

### **3.2.15 Public Presentations and Town Hall Meetings**

Target audiences include seniors, students, social services, businesses, and community leaders. The main goal is public education regarding the economic and environmental benefits of using public transportation. During presentations, SunLine highlights the key role it plays as a public transit provider and leader in alternative fuel technology. SunLine's use of hydrogen electric fuel cell and battery electric fuel cell buses has made a positive impact on the environment on a global scale. Presentations emphasize the importance of this initiative and how it affects residents of the Coachella Valley. Town hall meetings focus on gathering feedback from riders and potential riders regarding areas in need of service. These presentations and town hall meetings typically occur at senior centers, colleges, government agencies (e.g., City Council meetings, SCAG, CVAG, etc.), and adult special needs schools and programs.

### **3.2.16 Travel Training**

Transportation offers us a sense of independence and opportunities to engage with our community. SunLine's Travel Training Program provides riders with the chance to learn how to navigate a public transit system independently. To achieve this, SunLine offers group and one-on-one training virtually, in person, or aboard a fixed-route bus to build confidence and enable people to travel with ease. Travel training also includes onboard bus sessions for guide dogs assisting visually impaired individuals. In-person training sessions are held at senior centers, recreation centers, community centers, adult special needs schools, and aboard buses.

### 3.2.17 Transit Ambassador Program

The SunLine Transit Ambassador Program, known as TAP, empowers employees to expand SunLine's culture of customer service. TAP consists of a series of training sessions for SunLine employees that address crucial topics and everyday scenarios in public transportation service. A Transit Ambassador has completed this program and can assist passengers with their trip planning. Transit Ambassadors will assist the rider until they feel confident in navigating the SunLine system independently.

### 3.2.18 Youth Sustainability Advisory Committee

Established in 2022, the Youth Sustainability Advisory Committee is a student-led group that meets monthly and includes members aged 13 to 18 from each city in the Coachella Valley, mirroring the structure of the Board of Directors. Aligned with SunLine's long-term strategic plan and Board vision, the committee's mission is to support the implementation of sustainability initiatives through innovative, engaging, fun, and creative approaches.

### 3.2.19 Free Ride Policy

SunLine Transit Agency will provide free rides on our local fixed-route system on the dates listed below:

- Transit Equity Day
- Earth Day
- Dump the Pump Day
- Car Free Day
- California Clean Air Day
- Rideshare Week
- Election Day

SunLine Transit Agency's Marketing team is creating a set of guidelines to help staff determine whether additional days can be added or when requests for free rides can be accommodated.

## 3.3 Project Ridership Growth (FY26-28)

SunLine continues to recover fixed route ridership year over year. Based on current trends and projections, the expected ridership growth is as follows:

- **FY 2024 Actual:** 2,585,680 boardings
- **FY 2025 Projected:** 2,729,627 boardings (5.57% growth)
- **FY 2026 Projected:** 2,953,872 boardings (8.22% growth)
- **FY 2027 Projected:** 3,178,117 boardings (7.59% growth)
- **FY 2028 Projected:** 3,402,362 boardings (7.06% growth)

These projections suggest a consistent rise in ridership driven by service adjustments, enhanced reliability, and improved customer experience initiatives. Key initiatives contributing to this growth include:

- **Coachella Mobility Hub:** Expected to improve connectivity in the Eastern Coachella Valley.

- **Bus Stop and Amenity Upgrades:** This includes improved shelters and real-time passenger information systems.
- **CVAG Transit Signal Priority (TSP) Project:** SunLine is actively working with the Coachella Valley Association of Governments (CVAG) to implement TSP along major corridors like Highway 111. This initiative aims to reduce bus travel times by prioritizing buses at signalized intersections, improving reliability, and making transit a more competitive travel option.
- **Fleet Modernization:** Continued investment in zero-emission buses to support sustainability goals while improving operational efficiency.
- **Increase in Service North of I-10:** Due to increasing development and ridership demand, SunLine plans to expand service in the areas north of I-10, thereby improving transit access for residents and businesses in these growing communities.

As SunLine continues to monitor ridership trends, further adjustments may be made to optimize service levels, ensuring alignment with the evolving travel patterns in the Coachella Valley. Special attention will be given to high-growth areas, particularly those east of I-10, to provide sufficient transit coverage and accessibility.

### 3.4 Proposed Fare Structure Changes

SunLine conducted its last fare study in 2011 to analyze passenger fare usage for both fixed-route and on-demand paratransit services. This study aimed to explore potential adjustments to the fare structure and pricing in response to rising service costs and reduced state funding. Commissioned by the Board of Directors, the study recommended eliminating the \$0.25 transfer fee and the two-hour unlimited transfer window while increasing the base fare to \$1.25. Alternative scenarios considered raising it to \$1.35 or \$1.50. However, no changes were implemented following this study, and the fare has remained unchanged since 2002.

With SunLine's upcoming Comprehensive Operational Analysis (COA) update, a new fare study will evaluate the current fare structure in relation to projected conditions, transit demand in the Coachella Valley, and proposed service enhancements. The COA will examine the effects and feasibility of implementing a free fare, an increased fare, or maintaining the current fare.

Additionally, the implementation of a contactless fare payment system through the Open Loop Validators Project aims to enhance the ease of fare payment and collection for riders. Regardless of whether the cost of a bus ride changes, the contactless payment system will allow riders to tap their debit or credit cards to pay on the bus, where cash or paper passes were previously the only options. This new system will include built-in features such as fare capping, automatically ensuring that riders receive the best fare during their travel.

### 3.5 Capital Improvement Planning

SunLine Transit Agency's commitment to serving the Coachella Valley has been bolstered by successfully securing competitive grants. These grants are essential for the Agency to maintain its dedication to providing reliable transit services throughout the Coachella Valley. Additionally, these grants finance the capital projects that are crucial in supporting the Agency's aspiring goal of transitioning its entire fleet to zero-emission vehicles by 2035.

In fiscal year 2025, the Capital Projects department demonstrated significant skills in managing and delivering complex infrastructure upgrades and fleet replacement projects, as detailed in Figure 2-2. Looking forward to fiscal year 2026, the department remains committed to deploying

innovative projects that will further enhance the Agency’s day-to-day operations. These projects are outlined in Chapter 3.5.1.

During fiscal year 2025, the Capital Projects team successfully delivered a new Liquid Hydrogen Refueling Infrastructure at SunLine’s Division 1 in Thousand Palms. This station, equipped with liquid and gaseous storage, compression equipment, and dispensing capabilities, enhances the Agency's existing fueling infrastructure and provides fuel at both 350 and 700 bar. The Agency also celebrated the completion of the Coachella Transit Hub, a project that will positively affect the residents. Working closely with the City, the project established a sustainable transportation infrastructure designed to improve rider amenities. This initiative was undertaken under an Affordable Housing Sustainability Community Grant awarded to SunLine in partnership with the City of Coachella. The Coachella Hub will expand connectivity for riders throughout the Coachella Valley.

The Agency has also completed the Radio & On Bus Technology Upgrade, transitioning from an outdated analog radio system to cellular services. This upgrade will improve day-to-day communication for the Transportation Department, offering enhanced clarity, wider coverage, and increased efficiency. Furthermore, SunLine has successfully purchased eight new Hydrogen Fuel Cell Buses and ten new Paratransit Vehicles. These acquisitions replaced older vehicles that had reached the end of their useful life, supporting the Agency's goal of achieving a fully zero-emission fleet by 2035 and ensuring continued reliable paratransit services in the Coachella Valley.

Several other projects are currently in the bidding phase. The D1 Backup Generator project will enhance the connection to the Maintenance building with an automatic transfer switch and connect the Operations building to the backup generator. The D1 Pavement Replacement project will enable the Agency to keep the asphalt and concrete at its Thousand Palms, Division 1, in good condition. Additionally, the A&E Workforce Training Center project, which will fund the preliminary design for a training and maintenance facility focused on zero-emission bus technology, is also out for bids. This facility will support workforce training and include a maintenance bay for these vehicles.

### 3.5.1 Capital Projects Planned in FY26

SunLine Transit Agency is planning several significant projects in FY26, focusing on improving technology, infrastructure, and fleet sustainability in the Coachella Valley.

**Figure 3-2** Capital Projects

Project Name	Description	Status
Upgrade ITS (CAD/AVL System)	This project will replace the existing CAD/AVL system with a new and improved solution that will incorporate onboard hardware in the Agency's revenue and support vehicle fleet. The project will encompass the design, development, integration, and installation of the CAD/AVL system, including all necessary software and licensing requirements.	Implementation phase.

Workforce Training Center Construction	This project aims to construct a facility that will support a workforce training program focused on advancing and adopting zero-emission bus technology in public fleets. This facility will also feature a dedicated maintenance bay for these types of vehicles.	Planning phase.
Replacement Facility Building	This project will construct a prefabricated building for the Maintenance Facility department, offering storage, repair space, offices, a breakroom, and restrooms to support the Agency's daily upkeep of its facilities and bus shelters.	Project not started.
A&E Maintenance Facility Building	This project will fund the development of preliminary design documents, utilizing architectural and engineering services, to replace the current significantly aged Maintenance Facility in Thousand Palms.	Planning phase.
Planning Phase for Microgrid	This project supports the engineering and development of a solar microgrid infrastructure that will help lower fueling costs and is expected to improve the Agency's energy resilience for the daily deployment of its zero-emission transit fleet operations.	Planning phase.
D2 Liquid Hydrogen Refueling Infrastructure	This project will construct a hydrogen fueling station at SunLine's Division II in Indio, enabling hydrogen fleet operations in the East Valley, reducing costs, and increasing service sustainability. This project will support the Agency's goal of a 100% zero-emission bus fleet by 2035.	Utility Upgrade in Progress
Open Loop Validators	This project will fund the procurement and installation of contactless fare payment validator equipment on SunLine's fixed-route fleet, including service agreements for the maintenance of the payment devices/equipment and the operation of the fare processing services.	Planning phase.
Rolling Stock Procurement - Fuel Cell Buses	The procurement of these buses will replace CNG and older hydrogen fuel cell buses that have reached their useful life, furthering the Agency's efforts to achieve a fully zero-emission fleet by 2035.	Ongoing
Liquid Hydrogen Refueling Infrastructure	This project will construct a new liquid hydrogen station, which will include liquid storage, compression equipment, gaseous storage, and dispensing, providing both additional capacity and	Completed

	resiliency for the existing fueling infrastructure. The new station will be capable of dispensing fuel at 350 and 700 bar.	
Coachella Transit Hub	In collaboration with the City of Coachella, this project will establish sustainable transportation infrastructure, designed to enhance transportation-related amenities within the city. This initiative is being undertaken pursuant to an Affordable Housing Sustainability Community Grant awarded to SunLine, in partnership with the City of Coachella, enabling riders to connect with other fixed-route lines to travel across the Coachella Valley.	Completed
D1 Backup Generator	This project will upgrade the existing connection to the maintenance building by converting it to an automatic transfer switch, and it will also connect the operations building to the backup generator.	Out for bids
D1 Pavement Replacement	The project will allow the Agency to maintain the asphalt and concrete at its Thousand Palms division in a state of good repair.	Project is out for bids.
A&E Workforce Training Center	This project funds the preliminary design documents, including architectural and engineering services, for a training and maintenance facility. The facility will support a workforce training program for zero-emission bus technology in public fleets and include a maintenance bay for these type of vehicles.	Project is out for bids.
Radio & On Bus Technology Upgrade	This project will replace the outdated analog radio system with cellular services, resulting in improved day-to-day operational communications for SunLine's Transportation Department. This transition will offer benefits such as enhanced clarity and wider coverage, leading to increased efficiency and responsiveness.	Completed
Purchase of (8) Hydrogen Fuel Cell Buses	This project involves the purchase of fixed-route vehicles to replace buses that have exceeded their useful life of 12 years or 500,000 miles. This will support the Agency's goal of achieving a fully zero-emission fleet by 2035.	Completed
Purchase of (10) Paratransit Vehicles	This project will replace paratransit vehicles that have reached the end of their useful life. Replacing these vehicles is crucial for maintaining reliable and accessible transportation services in the Coachella Valley	Completed

The Upgrade ITS (CAD/AVL System) project is currently in the implementation phase. This initiative will replace the existing system with a new and improved solution that incorporates onboard hardware in the Agency's vehicles. This will enhance operational efficiency through better communication and data management.

Several projects are in the planning phase, indicating the Agency's commitment to future development. The Workforce Training Center Construction project will establish a facility focused on zero-emission bus technology, featuring a dedicated maintenance bay. The Planning Phase for the Microgrid project will investigate the development of a solar microgrid to lower fueling costs and enhance energy resilience for the Agency's zero-emission fleet. Similarly, the D2 Liquid Hydrogen Refueling Infrastructure project will prepare for the construction of a hydrogen fueling station in Indio, supporting the Agency's goal of achieving a 100% zero-emission fleet by 2035. The Open Loop Validators project will arrange for the procurement and installation of contactless fare payment equipment for the fixed-route fleet. Lastly, the A&E Maintenance Facility Building project will finance the preliminary design for replacing the significantly aged Maintenance Facility in Thousand Palms.

The Replacement Facility Building project will install a prefabricated structure for the Maintenance Facility department, offering essential storage, repair space, and office facilities. The Rolling Stock Procurement for Fuel Cell Buses and the Replacement of 15 Paratransit Vehicles projects will finance the acquisition of fuel cell buses and paratransit vehicles to replace aging CNG and hydrogen vehicles, advancing the Agency's zero-emission goals.

These projects reflect SunLine's commitment to modernizing its operations, investing in sustainable technologies, and enhancing services for the broader Coachella Valley community.

### **3.6 Long Term Vision (5 Years and Beyond)**

SunLine Transit Agency established an aggressive agenda to elevate and solidify the skill and competencies of its workforce in support of the Agency-wide strategic goal established for FY25 noted below:

**“GOAL 1: WORKFORCE INVESTMENT** – Facilitate a healthy workforce and ensure that they are adequately supported and equipped with the knowledge, expertise, and experience to meet the Agency’s operational requirements as they evolve and grow over time.”

In pursuit of that goal, the Agency focused its initial efforts on the leadership and management teams. The Agency’s executive team, consisting of department chiefs, participated in a six-session/64-hour leadership development program provided through the professional education program at the local community college. The focus was on developing essential leadership skills as the foundation for continuing to advance the Agency’s agenda in pursuit of its strategic priorities.

The Agency’s Deputy Chiefs, middle managers, and supervisors were provided online management training consisting of over 30 hours of supervisory theory and skill development. Monthly roundtable sessions supplemented the learning process to emphasize the application of skills, evaluate courses of action, and create viable responses and solutions to challenges faced.

These training opportunities, including participation in peer review activities and industry training workshops/conferences/seminars, have significantly helped supervisory staff see their value in the



organization, better define their roles, improve their thinking and management skills, grow their expertise, and work better as a strategically aligned team. The Agency's investment in leadership training is undoubtedly helping it move critical projects/programs forward quicker and more effectively. Also noteworthy is the fact that morale and communication have vastly improved as we have invested in the professional growth of our employees.

In addition to the extensive educational programs offered, SunLine has been working on an extensive cultural transformation program designed to establish strategic agency priorities and goals and align its business processes to ensure the achievement of those priorities. The program consists of nearly monthly strategic planning and working sessions, and the process is ongoing. Additional consultant support has been provided to the Chiefs related to the development of work plans, department goals, and action plans.

For FY 26 and beyond, the Agency established a revised strategic priority to strengthen its emphasis on staff and professional development:

**People & Workforce:** Our commitment to people and workforce strategy emphasizes fostering a culture that aligns with our vision, growing and creating opportunities for staff to realize their fullest potential, and maintaining staffing levels to meet the needs of our organization and customers effectively.

In pursuit of that priority, the Agency has launched several initiatives to achieve its goals.

### *Apprenticeships and Mentoring*

Staff is actively working with ATU Local 1277, California Transit Works (CTW), the local community college, and key stakeholders to establish maintenance and bus operator apprenticeship and mentor programs to support the recruitment and retention of frontline employees. The mentor program involves pairing a new hire with a seasoned employee to support on-the-job training and integration into the team, which would complement formal apprenticeship training done in coordination with the local community college. Similar mentor and apprenticeship programs in other transit agencies within the State of California have helped recruit and retain talent, as well as served to reduce absenteeism, disciplinary actions, and turnover.

### *Maintenance Training Program*

Staff is actively working with a consultant to build a training program for its vehicle maintenance staff, primarily focused on the fleet of hydrogen fuel cell buses ("HFCB"), to ensure that its mechanics have the full range of skills and knowledge to perform not only preventative maintenance and repairs, but also to diagnose issues and implement a comprehensive plan of corrective action. For the Agency to successfully grow and maintain its HFCB fleet, it needs to establish and maintain a training program that is specifically focused on staff's immediate operational needs. Once implemented and proven successful, the Agency can offer to train others in the industry on FCEBs.

### *Career Ladders*

SunLine Transit Agency is in the initial phases of formalizing, memorializing, and institutionalizing a comprehensive career ladder program outlining professional options within the Agency. Emphasizing that all employees should "stay curious" and pursue the many fascinating technical, operational, and administrative options available, career ladders illustrate the multitude of possibilities for

career growth and advancement using both linear and divergent career pathways. The intent of this program is to emphasize that an employee's original position on their initial date of hire may not necessarily be where they find their occupational home.

### *Continued Leadership Training*

The Agency purchased licenses for online training to continue its supervisory training programs for current and new supervisory staff. Newly hired or appointed supervisors/managers are assigned the 30-hour online training curriculum introduced in FY 24. Current managerial staff will tackle advanced leadership concepts through instructor-led and online curricula designed to develop insight into their personal qualities as it contributes to their ability to successfully manage and motivate staff, develop critical thinking and problem analysis skills, and instill the philosophy of continuous learning and improvement.

### *Succession Planning*

In conjunction with career ladders, SunLine is developing an aggressive succession planning program to ensure it has a ready pool of potential leaders to ensure the continuity of leadership capability across place and time. The program's objective is to provide both theoretical learning and experiential opportunities as well as practical application of skills learned to challenge the next generation of the Agency's leaders to stretch beyond their current capabilities and develop the necessary skills and knowledge to assume leadership roles.

# CHAPTER 4

## Financial Planning



FY26-28 SHORT-RANGE  
**TRANSIT PLAN**

## Chapter 4. Financial Planning

The FY2026 financial planning process focused on prioritizing resources and alignment with the core strategic goal of regaining ridership and providing multimodal solutions. The team at SunLine brought their diverse insights to most effectively allocate resources to maintain essential services. The enclosed financial plan of the Agency is based on the best available financial projections and anticipated grants.

### 4.1 Operating and Capital Budget

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In FY2026, SunLine will have an operating budget of \$50,500,000 and a capital budget of \$36,447,800 (Table 4 and 4A). The operating budget encompasses costs such as driver salaries, administrative salaries, fuel, insurance premiums, and other overhead costs required to run day to day operations. The available funding will be used effectively and efficiently in the accomplishment of organizational objectives. The operating budget will ensure that the Agency continues to offer safe and reliable transportation to Coachella Valley residents.

The capital budget incorporates key projects to help further advance the Agency's Capital Improvement Program. The Capital Improvement Program for FY2026 focuses on continuing SunLine's investment in replacing aging infrastructure and equipment. SunLine's Capital Program represents a unique opportunity to make long term investments in SunLine's operational capabilities, energy strategies, and regulatory compliance by conforming with the California Air Resources Board's Innovative Clean Transit mandate.

### 4.2 Funding Plans to Support Proposed Operating and Capital Program

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For FY2026, funding plans for the proposed operating and capital programs are primarily funded as follows:

FTA Section 5307, FTA Section 5311, FTA Section 5311 (f) (Intercity), FTA Section 5339, Congestion Mitigation and Air Quality (CMAQ), California Air Resources Board (CARB), California Energy Commission (CEC), Air Quality Management District (AQMD), State Transit Assistance (STA), State of Good Repair (SGR), Low Carbon Operating Program (LCTOP), Local Transportation Funds (LTF), Local Measure A funding, Senate Bill 125 (Transit and Intercity Rail Capital Program) and farebox revenue.

The estimated FY2026 operating and capital budget of \$86,947,800 outlined in Table 4, is funded by:



**Table 4.0 - Summary of Funding Requests - FY 2025/26**  
SunLine Transit Agency  
Original

Operating	Project	Total Amount of Funds	5307 IC	5307 IC OB	5307 RS OB	5311	5311(F)	5339 COMP	5339 IC	5339 IC OB	5339 RS OB	CEC Funds	CMAQ	CRP	FARE	LCTOP PUC89313	LCTOP PUC89314
1. Operating Assistance		\$47,574,460	\$5,161,120			\$438,000									\$1,791,863		
2. SunRide Ride Share Program		\$1,325,000													\$25,000		
3. Corralton Link 10		\$723,200					\$300,000										
4. Haul Pass Program		\$453,334														\$433,334	
5. Workforce Training		\$369,000										\$369,000					
6. Taxi Voucher Program		\$75,000															
<b>Sub-total Operating</b>		<b>\$50,000,000</b>	<b>\$5,161,120</b>	<b>\$0</b>	<b>\$0</b>	<b>\$438,000</b>	<b>\$300,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$369,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$1,816,863</b>	<b>\$433,334</b>	<b>\$0</b>

Capital	Project	Total Amount of Funds	5307 IC	5307 IC OB	5307 RS OB	5311	5311(F)	5339 COMP	5339 IC	5339 IC OB	5339 RS OB	CEC Funds	CMAQ	CRP	FARE	LCTOP PUC89313	LCTOP PUC89314
Buildings and Facilities - Div 1 Backup Generator - SL-20-05		\$1,700,000		\$121,277													
Buildings and Facilities - Indio Liquid Hydrogen Station - SL-20-03		\$6,000,000										\$2,649,750		\$2,680,200			
Buildings and Facilities - Maintenance Upgrade & Equipment - SL-20-07		\$400,000															
Buildings and Facilities - Office Furniture & Equipment - SL-20-05		\$82,000															
Buildings and Facilities - Replacement Bus Wash - SL-20-06		\$1,200,000															
Buildings and Facilities - Solar Covered Parking & EV charging - SL-20-02		\$6,000,000											\$5,100,000				
Buildings and Facilities - Solar Microgrid for Hydrogen - SL-20-01		\$11,536,134														\$1,795,720	\$204,280
Buildings and Facilities - Workforce Training Center - SL-20-04		\$3,716,667						\$2,043,508									
Bus Charging Stations (3) - SL-24-04		\$-1,679,854						\$-1,343,883									
Bus Stop Improvements - SL-22-08		\$-28,680		\$-28,680													
Bus Stops and Amenities - SL-23-12 & SL-24-14		\$-600,000		\$-600,000													
Communication and ITS - IT Projects - SL-20-09		\$766,680						\$666,680									
Expansion Fixed Route Bus 17-10 - SL-17-10		\$-449,975		\$-300,243													
Expansion Motor Coach Bus (1) - SL-22-01		\$-45,857		\$-30,685													
Expansion Paratransit Vans (up to 2) 17-02 - SL-17-02		\$-5															
Facility Maintenance Upgrade & Equipment - SL-24-13		\$-383,000															
Fixed Route Bus Hydrogen Electric Hybrid Fuel Cell Bus 17-09 - SL-17-09		\$-382,147		\$-300,000													
Hydrogen Electric Fuel Cell Bus (4) RV2220509 - SL-24-05		\$-3,149,403								\$-2,683,516							
Maintenance Equipment - Specialized Tools and Fueling Equipment - SL-20-10		\$200,000															
Non-Revenue Vehicles - Replacement Support Vehicles - SL-20-11		\$500,000	\$400,000														
Operation Facility Replacement, Phase III 20-11 - SL-20-11		\$-180,725															
Operator Training Ground - SL-24-07		\$-968,107															
Project Management and Administration - SL-20-12		\$200,000															
Purchase of Electric Bus (5) - SL-24-03		\$7,094,109						\$-6,802,910									
Purchase of Hydrogen Electric Fuel Cell Buses (3) - SL-24-01		\$-2,305,014						\$-1,699,526									

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**Table 4.0 - Summary of Funding Requests - FY 2025/26**  
SunLine Transit Agency  
Original

Returbished Hydrogen Fueling Station in Thousand Palms 16-03 - SL-16-03	\$-152,161		\$-121,277														
Replacement Bus - SL-21-02	\$-449,250		\$-359,400														
Replacement of Fixed Route Buses Six (6) 20-01 - SL-20-01	\$-449,686		\$-171,674														
Revenue Vehicles - Bus Rehabilitation - SL-20-15	\$300,000																
Revenue Vehicles - Purchase of Hydrogen Fuel Cell Electric Buses - SL-20-13	\$17,997,756		\$1,627,902					\$9,046,319		\$2,683,516							
Revenue Vehicles - Purchase of Paratransit Vehicles - SL-20-14	\$3,500,000	\$1,305,644							\$1,284,770		\$209,586						
Safety and Security - Safety Enhancements - SL-20-16	\$150,000																
Transit Shelters and Amenities - Bus Stop Improvement - SL-20-17	\$200,000																
Vehicle Systems - Openloop Contactless Fare Payment System - SL-20-19	\$642,768																
Vehicle Systems - Vehicle Equipment - SL-20-19	\$50,000																
<b>Sub-total Capital</b>	<b>\$36,447,800</b>	<b>\$1,705,644</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$2,043,508</b>	<b>\$1,284,770</b>	<b>\$0</b>	<b>\$209,586</b>	<b>\$2,649,750</b>	<b>\$5,100,000</b>	<b>\$2,680,200</b>	<b>\$0</b>	<b>\$1,795,720</b>	<b>\$204,280</b>
<b>Total Operating &amp; Capital</b>	<b>\$86,047,800</b>	<b>\$6,866,764</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$438,000</b>	<b>\$300,000</b>	<b>\$2,043,508</b>	<b>\$1,284,770</b>	<b>\$0</b>	<b>\$209,586</b>	<b>\$3,018,750</b>	<b>\$5,100,000</b>	<b>\$2,680,200</b>	<b>\$1,816,863</b>	<b>\$2,220,054</b>	<b>\$204,280</b>



For FY27 and FY28, figures presented in tables 4.2 and 4.3 to fund operating and capital expenditures are based on best available funding projections.

**TABLE 4.1 Summary of Funding Requests FY 26/27**



**Table 4.1 - Summary of Funding Requests - FY 2026/27**  
SunLine Transit Agency  
Original

Operating																
Project	Total Amount of Funds	S397 IC	S311	S311(F)	S339 COMP	CARB	CEC Funds	CMAQ	FARE	LCTOP PUC39313	LTF	MA SPT	OTHR FED	OTHR LCL	SGR PUC39313	STA PUC39313
1. Operating Assistance	\$49,231,447	\$4,528,022	\$436,844						\$1,791,893		\$32,434,025	\$7,000,000			\$3,040,693	
2. SunRide Ride Share Program	\$1,325,000								\$25,000		\$1,300,000					
3. Commuter Link 10	\$723,201			\$300,000							\$242,201			\$181,000		
4. Haul Pass Program	\$500,000									\$500,000						
5. Workforce Training	\$200,000					\$100,000	\$100,000									
6. Taxi Voucher Program	\$75,000										\$37,500			\$37,500		
<b>sub-total Operating</b>	<b>\$52,054,648</b>	<b>\$4,528,022</b>	<b>\$436,844</b>	<b>\$300,000</b>	<b>\$0</b>	<b>\$100,000</b>	<b>\$100,000</b>	<b>\$0</b>	<b>\$1,816,893</b>	<b>\$500,000</b>	<b>\$34,013,726</b>	<b>\$7,000,000</b>	<b>\$0</b>	<b>\$3,259,193</b>	<b>\$0</b>	<b>\$0</b>
Capital																
Project	Total Amount of Funds	S397 IC	S311	S311(F)	S339 COMP	CARB	CEC Funds	CMAQ	FARE	LCTOP PUC39313	LTF	MA SPT	OTHR FED	OTHR LCL	SGR PUC39313	STA PUC39313
Buildings and Facilities - Maintenance Upgrade & Equipment - SL-27-02	\$301,000															\$301,000
Buildings and Facilities - Office Furniture & Equipment - SL-27-03	\$100,000															\$100,000
Buildings and Facilities - Solar Covered Parking & EV charging - SL-27-01	\$9,000,000							\$4,500,000							\$1,500,000	
Communication and ITS - IT Projects - SL-27-04	\$300,000															\$300,000
Maintenance Equipment - Specialized Tools and Fueling Equipment - SL-27-05	\$100,000															\$100,000
Project Management and Administration - SL-27-06	\$300,000															\$300,000
Revenue Vehicles - Bus Rehabilitation - SL-27-10	\$500,000														\$500,000	\$500,000
Revenue Vehicles - Expansion CNG Paratransit Vehicles - SL-27-09	\$500,000														\$500,000	
Revenue Vehicles - Purchase of Hydrogen Fuel Cell Electric Buses - SL-27-07	\$9,252,000				\$2,950,692								\$4,990,000			\$1,441,308
Revenue Vehicles - Purchase of Paratransit Vehicles - SL-27-08	\$4,950,000	\$2,890,000						\$1,223,750								\$62,904
Safety and Security - Safety Enhancements - SL-27-11	\$200,000															\$200,000
Transit Shelters and Amenities - Bus Stop Improvement - SL-27-12	\$300,000															\$300,000
Vehicle Systems - Vehicle Equipment - SL-27-13	\$100,000															\$100,000
<b>sub-total Capital</b>	<b>\$22,953,000</b>	<b>\$2,890,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$2,950,692</b>	<b>\$0</b>	<b>\$0</b>	<b>\$5,723,750</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,990,000</b>	<b>\$0</b>	<b>\$2,050,000</b>	<b>\$3,705,302</b>
<b>Total operating &amp; Capital</b>	<b>\$75,007,738</b>	<b>\$7,388,022</b>	<b>\$436,844</b>	<b>\$300,000</b>	<b>\$2,950,692</b>	<b>\$100,000</b>	<b>\$100,000</b>	<b>\$5,723,750</b>	<b>\$1,816,893</b>	<b>\$500,000</b>	<b>\$34,013,726</b>	<b>\$7,000,000</b>	<b>\$4,990,000</b>	<b>\$3,259,193</b>	<b>\$2,050,000</b>	<b>\$3,705,302</b>
<b>FY 2026/27 Projected Funding Details</b>																
Total Estimated Operating Funding Request	\$52,054,648															

**TABLE 4.2 Summary of Funding Requests FY 27/28**

**Table 4.2 - Summary of Funding Requests - FY 2027/28**  
SunLine Transit Agency  
Original



Operating																
Project	Total Amount of Funds	5307 IC	5311	5311(F)	5338 COMP	CEC Funds	CMAQ	CRP	FARE	LCTOP OB	LTF	MA SPT	OTHR FED	OTHR LCL	SGR PUCS9313	STA PUCS9313
1. Operating Assistance	\$50,618,915	\$5,555,425	\$436,644						\$1,791,893		\$32,964,090	\$7,000,000		\$3,040,663		
2. Sunline Ridership Program	\$1,325,000			\$300,000					\$25,000		\$1,300,000			\$151,000		
3. Commuter Link 10	\$723,201									\$433,334						
4. Haul Pass Program	\$433,334															
5. Workforce Training	\$300,000					\$100,000										
6. Taxi Voucher Program	\$75,000															
<b>Sub-total Operating</b>	<b>\$53,575,450</b>	<b>\$5,555,425</b>	<b>\$436,644</b>	<b>\$300,000</b>	<b>\$0</b>	<b>\$100,000</b>	<b>\$0</b>	<b>\$100,000</b>	<b>\$1,816,893</b>	<b>\$433,334</b>	<b>\$34,573,791</b>	<b>\$7,000,000</b>	<b>\$0</b>	<b>\$3,259,163</b>	<b>\$0</b>	<b>\$0</b>
Capital																
Project	Total Amount of Funds	5307 IC	5311	5311(F)	5338 COMP	CEC Funds	CMAQ	CRP	FARE	LCTOP OB	LTF	MA SPT	OTHR FED	OTHR LCL	SGR PUCS9313	STA PUCS9313
Buildings and Facilities - Maintenance Upgrade & Equipment - SL-28-01	\$500,000															\$500,000
Buildings and Facilities - Office Furniture & Equipment - SL-28-02	\$100,000															\$100,000
Communication and ITS - IT Projects - SL-28-03	\$250,000	\$200,000														\$50,000
Maintenance Equipment - Specialized Tools and Fueling Equipment - SL-28-04	\$200,000															\$200,000
Non-Revenue Vehicles - Replacement Support Vehicles - SL-28-05	\$333,000						\$300,000									\$33,000
Project Management and Administration - SL-28-06	\$300,000															\$300,000
Revenue Vehicles - Bus Rehabilitation - SL-28-08	\$500,000															\$500,000
Revenue Vehicles - Purchase of Hydrogen Fuel Cell Electric Buses - SL-28-07	\$27,000,000	\$19,795,500											\$3,240,000		\$1,800,000	\$1,519,413
Safety and Security - Safety Enhancements - SL-2	\$200,000															\$200,000
9-09 Transit Shelters and Amenities - Bus Stop Improvement - SL-28-10	\$2,000,000	\$1,600,000														\$400,000
Vehicle Systems - Vehicle Equipment - SL-28-11	\$100,000															\$100,000
<b>Sub-total Capital</b>	<b>\$31,483,000</b>	<b>\$1,800,000</b>	<b>\$0</b>	<b>\$300,000</b>	<b>\$19,795,500</b>	<b>\$100,000</b>	<b>\$300,000</b>	<b>\$100,000</b>	<b>\$1,816,893</b>	<b>\$433,334</b>	<b>\$34,573,791</b>	<b>\$7,000,000</b>	<b>\$0</b>	<b>\$3,240,000</b>	<b>\$1,800,000</b>	<b>\$3,902,413</b>
<b>Total Operating &amp; Capital</b>	<b>\$85,058,450</b>	<b>\$7,355,425</b>	<b>\$436,644</b>	<b>\$300,000</b>	<b>\$19,795,500</b>	<b>\$100,000</b>	<b>\$300,000</b>	<b>\$100,000</b>	<b>\$1,816,893</b>	<b>\$433,334</b>	<b>\$34,573,791</b>	<b>\$7,000,000</b>	<b>\$0</b>	<b>\$3,240,000</b>	<b>\$1,800,000</b>	<b>\$3,902,413</b>
FY 2027/28 Projected Funding Details													\$53,575,450			
Total Estimated Operating Funding Request																

## **4.3 Regulatory and Compliance Requirements**

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### **4.3.1 Americans with Disabilities Act**

SunLine complies with ADA guidelines by providing a 100 percent accessible revenue service fleet for fixed route transit services and ADA paratransit vehicles. As funding becomes available, SunLine continues to provide bus stop improvements to ensure accessibility. Staff also coordinates with developers and contractors regarding construction projects to include bus stop improvements when the opportunity arises.

### **4.3.2 Disadvantaged Business Enterprise**

SunLine's most recent Disadvantaged Business Enterprise (DBE) program and goals were submitted to FTA in July 2025 and has an expiration date of September 2027.

### **4.3.3 Equal Employment Opportunity**

SunLine complies with federal regulations pertaining to employment and submits its Equal Employment Opportunity (EEO)-4 report annually to the U.S. Equal Employment Opportunity Commission (EEOC) and its EEO/Affirmative Action Program to FTA every 4 years, or as major changes occur in the workforce or employment conditions. The most recent EEO-4 report was submitted to the EEOC and certified in February 2024. The most recent EEO/Affirmative Action Program was revised and submitted to FTA in April 2024. The next update to the EEO/Affirmative Action Program is due to the FTA in March 2028.

### **4.3.4 Title VI**

Title VI protects people from discrimination based on race, color, and national origin in programs and activities receiving federal financial assistance. SunLine's Title VI report was submitted to FTA in January 2023 and has an expiration date of October 2025.

### **4.3.5 Transportation Development Act**

The Transportation Development Act provides two major sources of funding for public transportation: the LTF and STA. RCTC commissioned Michael Baker International to conduct the Triennial Performance Audit as required by the Transportation Development Act; recommendations from the auditors are referenced in section VI of that document.

### **4.3.6 Federal Transit Administration Triennial Review**

In accordance with regulations, SunLine completed an FTA Triennial Audit site visit in 2023 and has fully complied with all closeout and post-review documentation.

### **4.3.7 National Transit Database**

To keep track of the industry and provide public information and statistics as growth occurs, FTA's National Transit Database records the financial, operating, and asset conditions of transit systems. Staff submit monthly reports and a yearly report which is used for funding formulas.

### **4.3.8 Alternative Fuel Vehicles**

In alignment with SunLine's Board-approved Alternative Fuel Policy, all revenue vehicles in the fleet use CNG, electric, or hydrogen fuel. The current active fleet consists of 10 CNG buses, 36 hydrogen electric fuel cell buses, four (4) battery electric buses, three (3) CNG coaches, 39 CNG

paratransit vehicles, and 52 non-revenue CNG, gas and electric vehicles, including general support cars and trucks.

#### 4.4 Capital Project Status -

Figure 4-1 summarizes the status of SunLine’s existing capital projects and remaining funding as of March 2025.

Project	Project Description	Project Status	Total Project Funding Balance
<b>Vehicles &amp; Vehicle Improvements</b>			<b>\$34,418,167</b>
Purchase of Hydrogen Fuel Cell Bus (7)	Purchase of replacement fixed route vehicles to replace buses that have exceeded their useful life of 12 years of 500,000 miles.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	5,920,303
Purchase of Battery Electric Buses (6)	Purchase of replacement fixed route vehicles to replace buses that have exceeded their useful life of 12 years of 500,000 miles. The competitive funding for the buses and included electrical chargers were awarded to the agency as part of a competitive Low Now funding application.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	7,064,109
Purchase of Hydrogen Fuel Cell Electric Bus (1)	Purchase of replacement fixed route vehicle to replace buses that have exceeded their useful life of 12 years of 500,000 miles.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	1,100,000

Purchase of Fuel Cell Bus (1)	Purchase of replacement fixed route vehicle to replace buses that have exceeded their useful life of 12 years of 500,000 miles.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	768,000
Purchase of Fuel Cell Bus (1)	Purchase of replacement fixed route vehicle to replace buses that have exceeded their useful life of 12 years of 500,000 miles.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	649,088
Replacement of Fixed Route Bus (CNG)	Purchase of replacement fixed route vehicle to replace buses that have exceeded their useful life of 12 years of 500,000 miles.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	450,304
Expansion Fixed Route Bus (Fuel Cell)	Purchase of expansion fixed route vehicle.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	382,147
Expansion Fixed Route Bus (Motor Coach)	This project will allow the purchase of one (1) additional MCI bus to meet the needs of the Agency.	Staff working with FTA to combine remaining fixed route funding for a new order of replacement fuel cell buses.	45,857
<b>Sub-total Fixed Route Vehicles</b>			<b>16,379,808</b>

Purchase of Paratransit Vehicles (15)	This project will allow the replacement of fifteen paratransit vehicles that have met their useful life.	Project not started.	3,600,000
Purchase of Paratransit Vehicles (10)	This project will allow the replacement of ten (10) paratransit vehicles that have met their useful life.	Project initial delayed due to CARB certification of CNG engine. Paratransit vehicles delivered in early calendar year 2025.	2,309,592
<b>Sub-total Demand Response Vehicles</b>			<b>5,909,592</b>
Micro Transit Expansion (4)	This project will allow the procurement of two (2) micro transit Chrysler Voyager vehicles that are ADA accessible.	Both vehicles have been received and the project. The project is closed.	170,576
H2 Vehicle Demonstration	This project will support the make ready costs for the demonstration of four (4) 22-foot hydrogen fuel cell vehicles. Vehicles to be demonstrated in Agency service including the ability to assign to microtransit.	All four (4) vehicles have been delivered but are not yet ready to be placed into service.	33,556
<b>Sub-total Micro Transit Vehicles</b>			<b>204,132</b>
Purchase of Stops & Zones CNG Trucks (3)	Purchase of three (3) support trucks to replace the current vehicles that have met their useful life.	The vehicles have been manufactured but are waiting CARB certification for the CNG conversion before the vehicles are completed and delivered to SunLine.	183,383

Purchase of Shop Service CNG Vehicle (1)	This project is for the purchase of a shop service vehicle to support the Maintenance and Transportation departments.	The vehicles have been manufactured but are waiting CARB certification for the CNG conversion before the vehicles are completed and delivered to SunLine.	159,400
Purchase of Administrative Vehicles (2)	This project is for the purchase of two (2) support vehicles.	Project not started.	119,971
<b>Sub-total Support Vehicles</b>			<b>462,754</b>
CNG Bus Refurbishments (12)	Refurbishment of 12 CNG buses to extend their useful life. This will allow time to obtain zero emission replacement buses.	FTA has approved the project scope change in the model year of buses to be refurbished. The project will begin in the second half of CY25.	5,300,607
Bus Rehabilitation	This project allocates funding to ensure that the Agency's vehicles remain in a state of good repair.	Project not started.	384,703
<b>Sub-total Bus Rehabilitation</b>			<b>5,685,310</b>
Upgrade ITS (CAD-AVL)	This project will allow the replacement of the ITS system for the fleet.	The contract award has been approved by the Board and the contract is expected to be executed in the second quarter of CY25 and the project completed by the end of CY25.	4,913,144

Radio System Replacements Phase 1 & Phase 2	This project will allow the replacement of the current radio system from analog to cellular services that will improve the day-to-day operational communications of SunLine's Transportation department.	The radios were installed at the end of CY24.	694,475
<b>Sub-total Radio Replacements</b>			<b>5,607,619</b>
Fare Collection Modernization (Study)	This project will allow the Agency to conduct a study of its fare collection mechanism and provide recommendations on new technology to replace the existing fareboxes.	Project not started.	100,000
H1 Vehicle Demonstration	This project will support the make ready costs for the demonstration of one (1) hydrogen fuel cell vehicle.	Vehicle has been delivered but it is not yet ready to be placed into service.	68,952
<b>Sub-total Others</b>			<b>168,952</b>
<b>Facilities &amp; Stations</b>			<b>\$36,877,514</b>
Public Hydrogen Station Expansion	This project will allow the Agency to provide hydrogen to the public through 700 bar dispensers.	Project not started.	9,725,000
Liquid Hydrogen Refueling Infrastructure	The new liquid hydrogen station will include liquid storage, compression equipment, gaseous storage and dispensing, providing both additional capacity and resiliency for the existing fueling infrastructure.	Project is undergoing the final commissioning phase for the 700 bar dispensing.	1,271,704

	The new station will be capable of dispensing fuel at 350 and 700 bar.		
Liquid Hydrogen Trailer	The new liquid hydrogen station in Indio would allow the Agency to fuel hydrogen fuel cell buses on the East end of the Valley and provide an opportunity for the public to access hydrogen.	Utility upgrades are currently being planned and discussed with IID to support power requirements of new station and backup generator.	8,852,950
Center of Excellence	This project is for the construction of a facility to serve as a training center and maintenance bay for zero-emission vehicles.	Bids received were higher than what was originally anticipated by the project team. Staff is currently reviewing the scope and will look to allocate additional funding.	3,598,522
Microgrid to Hydrogen	The microgrid will utilize power generated through solar panels to stored onsite in batteries. The project will reduce operating costs and provide for additional resiliency from green power.	Land has been purchased. The next step is the planning phase for the solar panels.	3,513,789

Coachella Transit Hub	This project is in conjunction with a grant awarded to SunLine as part of the Affordable Housing Sustainability Community Grant. SunLine, along with the City of Coachella, will construct sustainable transportation infrastructure to provide transportation related amenities.	The project has been completed.	11,692
Indio CNG Station Upgrade	The project will upgrade the existing equipment and CNG station in Indio.	Project not started.	2,277,000
Electrolyzer	This project deployed five (5) new 40-foot fuel cell electric buses along with the upgrade of SunLine's existing hydrogen refueling station with a new electrolyzer.	Contractor failed to meet site acceptance test by the December 2023 deadline. Staff is actively working on the next steps of the project.	737,198
Bus Stop Improvements	Bus stop improvements funds are utilized to replace and install new amenities in locations that meet the Agency's ridership and equity standards.	Project ongoing.	1,335,002
Operator's Training Ground	The project will allow the Agency to begin the initial stages of the plan to utilize its existing land to develop an area where operators can be trained on how to maneuver buses in a safe location.	Project not started.	998,107
Asphalt & Concrete Upgrade	The project will allow the Agency to maintain the asphalt and concrete at its	Project not started.	1,000,000

	Thousand Palms division in a state of good repair.		
Design & Construction of New Storage Building	This project would allow the Agency to construct a new pre-fabricated building for the Facility Maintenance staff.	Project started.	not 800,000
Facility Maintenance Upgrade	This project will support the purchase of equipment and facility improvements.	Ongoing.	835,073
SoCal Gas Demonstration Project	SunLine, in partnership with the Southern California Gas Company, will install, test, monitor, and demonstrate a Steam Methane Reformer (SMR) in various operating conditions at SunLine's Thousand Palms facility.	Project has completed the demonstration period and the equipment is being removed by SoCal Gas.	480,761
Automatic Transfer Switch (ATS) T-1 & T-2	This project will upgrade the existing connection to the maintenance building by converting it to an automatic transfer switch and will connect the operations building to the backup generator.	Project being revised to replace existing generator with a new generator capable of supporting the new liquid hydrogen station as well as the operations and maintenance buildings. Environmental approvals are currently ongoing.	240,179
Upgrade Gate and Guard Shack	This project will make upgrades to the existing entrance and guard shack at the main entrance to the Thousand Palms facility.	Project started.	not 270,350

Facility Im- provements	This project will support the purchase of facility improvements.	Ongoing.	322,000
Maintenance Facility Mod- ernization (Study)	The project would assist the Agency conduct a study for future plans for the maintenance facility.	Project has been initiated.	200,000
Repair of Division 1 Maintenance Roof	The project will allow the Agency to make repairs to the roof in the maintenance shop at its Thousand Palms division.	Project started. not	200,000
Indio Facilities Improvements	The project would allow the Agency to make improvement and repairs to the Indio division property.	Ongoing.	79,159
Thousand Palms Facilities Improvements	This project will support the purchase of facility improvements.	Ongoing.	12,172
Upgrade Division 1 Fence	This project will allow the Agency to make upgrades to the fence surround the property at the Thousand Palms division.	Project started. not	36,856
Perimeter Lighting Division 1	Installation of perimeter lighting to enhance the safety and security of the Thousand Palms facility.	Project started. not	80,000
<b>Equipment</b>			<b>\$2,283,416</b>
Bus Chargers	Purchase of bus chargers to support the purchase for six (6) new electric buses. The competitive funding for the buses and included electrical chargers were awarded to the agency as part of a competitive Low Now funding application.	Project started. not	1,679,854

Tools & Equipment	This project will support the purchase of equipment needed in the maintenance department.	Project started.	not	312,401
Miscellaneous Equipment	The project will allow the replacement of existing assets once they have met their useful life.	Project started.	not	291,161
<b>Systems</b>				<b>\$2,536,808</b>
Project Management & Administration	This project allows the Agency to capitalize project management costs from third party contractors. Funding will be used when individual project costs do not allow for project management or do not have the budget to support project management.	Project is ongoing.		683,783
Software Expansion	This project would facilitate the Agency's need for software upgrades across its operations.	Project started.	not	600,000
Information & Technology	The project focuses on the purchase of information technology equipment such as servers, switches and battery backup systems, desktop replacements.	Staff is working with new IT contractor to identify priority of Agency needs.		617,621
Transit Asset Management	This project will allow the purchase of an asset management tool for the Maintenance Department.	Software has been implemented and staff is working with vendor to close project.		53,759
Access Control Surveillance	This project will allow the procurement and installation of new access control systems around the Agency.	Project has been completed.		99,271

Safety Projects	This project will be allow the Agency to improve overall safety of its facilities by enhancing the perimeter fence, gates and surveillance.	Project started. not	250,000
Real Time Surveillance System	This project is to add real time video surveillance to all Agency support vehicles.	Contract award was approved by the Board at the April 2025 meeting.	90,000
Timekeeping Software Integration	This project is to replace an existing timekeeping interface between two software systems within the Agency.	Project has been completed.	82,374
Safety Enhancements	This project will be allow the Agency to improve overall safety of its facilities by enhancing the perimeter fence, gates and surveillance.	Project started. not	60,000
<b>Grand Total</b>			<b>\$76,115,905</b>

## SunLine Transit Agency

<b>DATE:</b>	<b>June 25, 2025</b>	<b>ACTION</b>
<b>TO:</b>	<b>Strategic Planning &amp; Operational Committee Board of Directors</b>	
<b>FROM:</b>	<b>Greg Wildman, Chief of Strategic Alignment</b>	
<b>RE:</b>	<b>Adoption of Fiscal Year 2026 Strategic Plan</b>	

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### **Recommendation**

Recommend that the Board of Directors (Board) adopt the SunLine Transit Agency (SunLine) Fiscal Year (FY) 2026 Strategic Plan.

### **Background**

SunLine engaged Insight Strategies, Inc. (Insight) in March 2024 to work with staff to identify key strategic priorities as the focus of the agency's efforts through FY28.

Insight conducted one-on-one and group interviews, as well as in-person focus groups with staff from all levels of the organization to gather employee thoughts, ideas and opinions on topics and issues that contribute to or have an effect on a wide range of topics including, but not limited to, the agency's culture, working relationships, quality of leadership, employee engagement, transparency of and participation in decision-making, safety and customer service. Additional information was solicited using a comprehensive survey distributed for employees to voluntarily complete.

The aggregated data from these efforts was presented in the final assessment report. The data, as well as detailed feedback from employees, was used to inform and shape the strategic priorities, goals and tactical plans. The CEO/General Manager, Executive Team and Managers further collaborated to develop the FY25 Strategic Priorities, as follows:

1. **Service Reliability**: Our commitment to service reliability centers on building ridership trust by delivering a seamless transit experience and being there when we say we are going to be there.
2. **Customer Experience**: Our customer experience commitment focuses on all aspects of the customer's journey with an emphasis on achieving respectful, timely and accessible service.
3. **Environmental Impact**: We are committed to reducing our carbon footprint by working closely with SunLine Transit Operations to support sustainable initiatives and by implementing green energy solutions.

4. Safety and Security: Our safety and security commitment focuses on protecting staff and rider within the Sunline system, creating a culture of safety that protects our communities, while minimizing risk and ensuring accountability to safety and security exists for all.
5. People/Workforce: Our workforce strategy emphasizes fostering a culture that aligns with our vision, growing and creating opportunities for staff to realize their fullest potential, and maintaining staffing levels to meet the needs of our organization and customers effectively.
6. Resource Acquisition, Allocation and Management: Our resource management commitment prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability. We emphasize the importance of organizational accountability and responsibility in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.

Strategic Goals and action plans have been developed to support the achievement of each of the Strategic Priorities. These goals can be reviewed for each Strategic Priority in the attached Strategic Plan.

The FY26 Strategic Plan is the culmination of the extensive and in-depth work completed under the guidance and direction of Insight Strategies over the past 16 months, and reflects the collective thoughts and efforts of staff at all levels of the Agency.

### **Financial Impact**

There is no financial impact.

### **Performance Goal**

**Goal 4: Valuable Community Asset** – Be seen as a highly valued and integral contributor to shaping socially engaged, economically vibrant, and healthy communities throughout the Coachella Valley.

### **In Collaboration with:**

Executive Team

### **Approved/Reviewed by:**

Mona Babauta, CEO/General Manager  
Catherine J. Groves, General Counsel

Attachment:

- [Item 14a](#) – FY26 Strategic Plan

# SunLine Transit Strategic Plan

January 2025 – June 2028



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## Letter from the CEO

It is a true honor to present SunLine Transit Agency's (STA) 3-year Strategic Plan, an ambitious roadmap that sets the stage for transformative projects, programs and initiatives shaping the future of the agency and the mobility landscape for the Coachella Valley. I extend my sincere appreciation to STA's Board of Directors for their leadership in adopting this Strategic Plan and advancing the strategic priorities and goals that will allow for STA's long-term success as the Valley's sole public transportation provider.



I also want to express my gratitude to our dedicated employees, who safely transport residents to work, school, medical appointments and other essential destinations every day. Their valuable feedback gathered through an agency-wide survey process, one-on-one interviews, and focus groups has been instrumental in shaping the strategic priorities and action plans over the past year. Their time, energy, and commitment are deeply valued.

In July 2025, STA will celebrate 48 years of service, marking the beginning of a two-year countdown to our 50th Anniversary. This milestone underscores the urgency and importance of delivering major projects and programs that will sustain high quality and safe transportation services. We'll accomplish this while realizing our mission of *connecting people and improving life by taking our customers from where they are to where they want to be...in all respects.*

Among these projects is the Workforce Training Center (WTC), which exemplifies our commitment to investing in the professional growth of our employees and ensuring we have a skilled workforce that will continue STA's legacy of advancing clean air technology and innovation while providing leadership succession and excellence going forward. The strategic plan and annual budget also highlight other foundational programs and projects that enhance customer and employee safety, and support organizational and operational sustainability. These efforts are essential to meeting the growing and increasingly diverse mobility needs of the Coachella Valley.

At the heart of our success is our people. Supporting our employees is my number one priority. Their commitment, dedication, skills and expertise enable STA to deliver on its priorities and meet the Coachella Valley's mobility needs, both today and in the future. The Board's continued leadership and policy direction to maximize operational safety,

maintain strong financial and environmental stewardship, and prioritize customer service and trust will be our guiding star.

This Strategic Plan provides the blueprint for building on our past success and defining how we will work together to realize an even more impactful future. Through our collective efforts, there will be much to celebrate when STA reaches its 50th Anniversary during the life of this Strategic Plan.

# Mona Babauta

Mona Babauta, CEO/General Manager



## Introduction to the SunLine Transit Strategic Plan

A strategic plan serves as a roadmap that outlines an agency's goals and strategies. Its purpose is to provide a clear direction and guide decision-making processes within the agency. By looking ahead and setting goals for the next three years, the strategic plan helps align the efforts of different departments and stakeholders toward a common vision. It provides a comprehensive and holistic view of the agency's future.

The benefits of a strategic plan are many. First, it enhances organizational focus by defining priorities and setting clear goals. Second, it improves resource allocation by identifying the key areas where investments and efforts should be concentrated. Lastly, a strategic plan promotes accountability and performance measurement. Overall, a well-crafted strategic plan provides a roadmap for success, fosters organizational growth, and enhances adaptability.

### **Insight Strategies' Organizational Health and High-Performance Framework®**

To aid in the facilitation of the strategic planning process, SunLine Transit engaged the consulting firm Insight Strategies, Inc. With 30+ years' experience consulting with executives and organizations on organizational excellence, Insight has crafted an Organizational Health & High-Performance Framework® that has proven success. SunLine Transit's strategic plan was grounded in this excellence model.

Organizations perform at their best when employees see themselves and the roles they play in the mission and aspirational vision of the organization ("the why"); when strategies and goals are clear and aligned to the mission and vision ("the what"); when key processes anchor the mission, vision, and strategies into the day to day operations – driving employee effectiveness and accountabilities ("the how"); and when the right people are in the right positions to implement the strategies and goals and exemplify the desired culture ("the who"). Ensuring all components are maximized and aligned results in an organization's ultimate success. (See graphic)



***As Peter Drucker famously said, "Culture eats strategy for breakfast."***

## Strategic Plan Overview

### SunLine Transit's Mission Statement

*Connecting people and improving life by taking you from where you are to where you want to be.*



## Strategic Priorities

**1. Service Reliability:** Our commitment to service reliability centers on building ridership trust by delivering a seamless transit experience and being there when we say we're going to be there.

**Priority Owner:** *Chief Transportation Officer*

**2. Customer Experience:** Our commitment to customer experience commitment focuses on all aspects of the customer's journey with an emphasis on achieving respectful, timely, and accessible service.

**Priority Owner:** *Director of Board & Legislative Affairs*

**3. Environmental Impact:** Our commitment to environmental impact is to reduce our carbon footprint by working closely with SunLine Transit Operations to support sustainable initiatives and by implementing green energy solutions.

**Priority Owner:** *Deputy Chief of General Services*

**4. Safety & Security:** Our commitment to safety and security commitment focuses on protecting staff and riders within the SunLine system, creating a culture of safety that protects our communities, while minimizing risk and ensuring accountability to safety and security exists at all levels.

**Priority Owner:** *Chief Safety Officer*

**5. People & Workforce:** Our commitment to people and workforce strategy emphasizes fostering a culture that aligns with our vision, growing and creating opportunities for staff to realize their fullest potential, and maintaining staffing levels to meet the needs of our organization and customers effectively.

**Priority Owner:** *Chief of Human Relations*

**6. Resource Acquisition, Allocation, and Management:** Our commitment to resource management prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability. We emphasize the importance of organizational accountability and responsibility in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.

**Priority Owner:** *Chief Financial Officer*

## Strategic Priority #1: Service Reliability

**Strategic Priority Owner: Chief Transportation Officer**

**Strategic Agency Goal 1:** Increase and sustain fleet availability for Fixed Route to 20% above scheduled peak requirement by May 3, 2025. (ex. Current requirement is 41 peak, 49 active fleet).

**Goal Owner:** Chief Maintenance Officer

**Goal Team Members:** HR/Human Resources Specialist - Recruitment; Deputy Chief Maintenance Officer, Supervisors, Superintendent & Maintenance Analyst; Operations/Fixed Route Lead Controller

**Cross-Functional Support Needed:**

- HR
- Planning
- Procurement
- Safety
- CEO/GM
- Operations
- IT
- Finance
- Strategic Alignment

**Execution Plan**

1. Identify Team Members
2. Complete initial fleet assessment
3. Complete workforce assessment
4. Fill mechanic vacancies
5. Restructure the preventative maintenance plan and standard operating procedures (SOPs) to improve efficiencies
6. Assess and evaluate current comprehensive fleet maintenance plan

**Strategic Agency Goal 2:** Increase and sustain fleet availability from calendar year 2024 levels for paratransit to 90% of fleet to be completed by May 1, 2025.

**Goal Owner:** Chief Maintenance Officer

**Goal Team Members:** HR/Human Resources Specialist - Recruitment; Maintenance/Deputy Chief Maintenance Officer, Supervisors, Superintendent, Maintenance Analyst; Operations/Paratransit Lead Controller

**Cross-Functional Support Needed:**

- HR
- Planning
- Procurement
- Safety
- CEO/GM
- Operations
- IT

**Execution Plan**

1. Identify Team Members
2. Complete initial paratransit fleet assessment
3. Complete workforce assessment
4. Fill mechanic vacancies
5. Restructure the preventative maintenance plan and standard

<ul style="list-style-type: none"> <li>• Finance</li> <li>• Strategic Alignment</li> </ul>	<p>operating procedures to improve efficiencies</p> <ol style="list-style-type: none"> <li>6. Assess and evaluate current comprehensive fleet maintenance plan</li> <li>7. Continuously assess, monitor, and analyze to achieve and maintain results</li> </ol>
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**Strategic Agency Goal 3a:** Establish agency operational standards for fleet and facilities maintenance and replace by June 30, 2025.

**Strategic Agency Goal 3b:** Achieve 100% adherence to agency operational standards by SunLine staff by December 31, 2025.

**Goal Owner:** Chief Maintenance Officer

**Goal Team Members:** SunFuels/Alternative Fuels Program Manager; Maintenance/Chief Maintenance Officer, Deputy Chief Maintenance Officer, Deputy Chief of Facilities, Maintenance Analyst; Planning/Planning Manager -Strategic Planning and Analytics

**Cross-Functional Support Needed:**

- Planning
- Finance
- Safety
- CEO/GM
- Operations

**Execution Plan**

**Goal 3a**

1. Identify team members
2. Create SOPs and policies
3. Maintain standards by implementing the new procedures in tailgate meetings
4. Kickoff & stakeholder engagement
5. Current state assessment
6. Draft operational standards
7. Review and feedback loop
8. Finalization of standards
9. Formal approval and communication

**Goal 3b**

1. Training & onboarding plan developed
2. Staff training completed
3. Implementation launch
4. First adherence audit / spot checks
5. Corrective action & support plans implemented
6. Final adherence audit
7. Celebrate & close out

**Strategic Agency Goal 4:** Establish a contingency plan to achieve 100% fueling availability at all times by June 30, 2025.

**Goal Owner:** Chief Maintenance Officer

**Goal Team Members:** Finance/Deputy Chief of General Services; Planning/Chief Planning Officer; Capital Projects/Chief of Capital Projects; Safety/Chief Safety Officer; Operations/Chief Transportation Officer; Maintenance/Chief Maintenance Officer

**Cross-Functional Support Needed:**

- Finance
- Planning
- Capital Projects
- Safety
- Operations
- CEO/GM
- Maintenance

**Execution Plan**

1. Identify key personnel needed
2. Create initial inspection and check list
3. Identify all manuals and specific locations
4. Create emergency/support call list
5. Create step-by-step SOPs
6. Create an action plan to activate Contingency Fleet
7. Identify alternative fueling resources and location by type
8. Set up mutual agreements with potential vendors or MAC
9. Create activation approval hierarchy list
10. Make multiple binders with all information and place in accessible location

**Strategic Agency Goal 5:** Implement strategies towards achieving fixed route missed trips to zero by June 30, 2025.

**Goal Owner:** Chief Transportation Officer

**Goal Team Members:** Operations/Fixed Route Lead Controller, lead supervisor, supervisors; Planning/Scheduler; Maintenance/Shop Leads; Human Resources/Human Resources Specialist - Recruitment

**Cross-Functional Support Needed:**

- Maintenance
- IT
- Planning
- Safety
- Operations
- CEO/GM
- HR

**Execution Plan**

1. Analyze current performance
2. Create KPIs
3. Enhance operator training
4. Monitor and adjust schedules
5. Incentivize performance
6. Conduct regular feedback sessions

**Strategic Agency Goal 6a:** Establish a comprehensive plan/training program for maintenance staff to develop skillsets needed to maintain 100% of the fleet.

**Strategic Agency Goal 6b:** Establish a basic universal level of skills competency across 100% of the fleet maintenance staff by January 30, 2027.

**Goal Owner:** Chief Maintenance Officer, Chief of Strategic Alignment, and Chief of Human Relations

**Goal Team Members:** HR/Chief of Human Relations; Strategic Alignment/Chief of Strategic Alignment; Maintenance/Deputy Chief Maintenance Officer, Superintendent of Zero Emissions Technology; Training/Senior Training Supervisor; Finance/Deputy Chief of General Services

**Cross-Functional Support Needed:**

- Marketing
- Safety
- CEO/GM
- Finance
- HR
- SunLine University
- California Transit Training Consortium (CTTC)
- California Transit Works (CTW)/ Amalgamated Transit Union Local 1277 (ATU)
- Original Equipment Manufacturers (OEMs)
- Procurement

**Execution Plan**

1. Identify training needs
2. Assess individual personnel skill set
3. Identify trainer
4. Develop structure and order of training plan
5. Assess current curriculum, identify gaps, develop new or expand existing content
6. Create partnerships with OEMs, CTTC, and CTW
7. Create incentive program for training
8. Launch program

**Strategic Agency Goal 7:** Decrease voluntary turnover of coach operators from 13.5% to less than 5% for the next 3 years (June 30, 2026).

**Goal Owner:** Chief Transportation Officer and Chief of Human Relations

**Goal Team Members:** Human Resources/Chief of Human Relations, Human Resources Specialist – Recruitment; Operations/Superintendent of Transportation

**Cross-Functional Support Needed:**

- HR
- Finance
- Operations
- Planning
- Safety/Training

**Execution Plan**

1. Baseline analysis – determine current voluntary turnover rate
2. Action plan developed and approved
3. Pilot interventions launched
4. Midpoint evaluation and adjustments
5. Full rollout
6. Final Review and reporting

**Strategic Agency Goal 8:** Expand service to meet growing community needs within 3 years of resources becoming available.

**Goal Owner:** Chief Planning Officer

**Goal Team Members:** Planning Department/Chief Planning Officer, Transit Planning Manager, Planning Manager-Strategic Planning and Analytics; Operations Management/Deputy Chief of Transit Operations; Marketing department

**Cross-Functional Support Needed:**

- HR
- Maintenance
- Finance
- Marketing
- Operations

**Execution Plan**

1. Distribute RFP
2. Conduct interviews with RFP respondents
3. Select a vendor that will support SunLine’s vision
4. Bring the resolution before the Board of Directors for approval
5. Phase 1: Data collection with consultant
6. Phase 2: Analysis w/ consultant
7. Phase 3: Network scenarios with consultant
8. Phase 4: Comprehensive Operational Analysis (COA) Report from consultant
9. Phase 5: Adoption

## Strategic Priority #2: Customer Experience

**Strategic Priority Owner: Director of Board & Legislative Affairs**

**Strategic Agency Goal 1a:** Establish a measurable baseline of brand and service awareness by conducting a community outreach survey by June 30, 2026.

**Strategic Agency Goal 1b:** Improve positive perception of brand and service awareness from baseline to 95% over the next (3) years, by December 31, 2029.

**Goal Owner:** Director of Board & Legislative Affairs

**Goal Team Members:** Planning Department/Planning Manager-Strategic Planning and Analytics; Marketing/Marketing & Events Manager; Communications Coordinator, Marketing Specialist; Safety/Safety Manager

### Cross-Functional Support Needed:

- Marketing
- HR
- Safety
- Operations
- CEO/GM
- Planning

### Execution Plan

1. Identify team members
2. Identify and confirm cross-functional interdependencies
3. List possible XFI, request participation, confirm with initials
4. Engage Services of third-party transit-oriented survey company
5. Create outreach and survey strategy/strategies
6. Engage with community partners to get data (i.e.: CVEP) or facilitate survey process
7. Create a survey template
8. Pre-survey marketing efforts
9. Conduct survey – defined in survey strategy
10. Collect and analyze data
11. Present the findings
12. Collaborate with other department heads on service and external facing improvements

**Strategic Agency Goal 2:** Enhance customer experience and service accessibility by implementing a new app/technology with accurate real-time bus tracking and service alerts with fare payment options by December 31, 2026.

**Goal Owner:** Chief Planning Officer

**Goal Team Members:** Maintenance/Chief Maintenance Officer; Marketing/Marketing & Events Manager; Capital Projects/Chief of Capital Projects; IT/Deputy Chief of General Services

**Cross-Functional Support Needed:**

- Marketing
- IT
- Safety
- Operations
- Maintenance
- Capital Projects

**Execution Plan**

1. Implementation of Transit App
2. Implementation of Computer-Aided Dispatch/Automatic Vehicle Location (CAD/AVL)
3. Implementation of contactless open loop fare payment system

**Strategic Agency Goal 3:** Establish a measurable baseline of current service and operations by conducting a COA to be completed by December 31, 2027.

**Goal Owner:** Chief Planning Officer

**Goal Team Members:** Marketing/Director of Board & Legislative Affairs; Human Resources/Chief of Human Relations; Operations/Chief Transportation Officer; CEO/GM

**Cross-Functional Support Needed:**

- Marketing
- HR
- Operations
- CEO/GM

**Execution Plan**

1. Initiate and complete COA

**Strategic Agency Goal 4a:** Understand customers, potential customers, community values and needs from the time a person thinks about transit to their final destination by embarking on a journey mapping strategy to be completed by June 30, 2026.

**Strategic Agency Goal 4b:** Improve customer experience (CX) by closing 100% of the gaps uncovered in the journey mapping plan by June 30, 2027.

**Goal Owner:** Director of Board & Legislative Affairs

**Goal Team Members:** Marketing/Marketing & Events Manager; Planning/Planning Manager – Strategic Planning and Analytics; Operations/Deputy Chief of Transit Systems & Technology

**Cross-Functional Support Needed:**

- Planning
- Marketing

**Execution Plan**

1. Identify team members
2. Identify and confirm cross-functional interdependencies
3. List possible cross-functional interdependencies (XFI), request participation, confirm with initials
4. Define journey mapping scope, goals, and customer segments
5. Develop journey mapping framework and methodology
6. Create stakeholder and community engagement plan
7. Identify and onboard community partners and facilitators
8. Launch customer engagement and data collection phase
9. Conduct ride-along, focus groups, interviews, and surveys
10. Complete community outreach
11. Begin analysis and synthesis of journey data
12. Draft journey maps by rider type
13. Identify pain points, moments of delight, and improvement opportunities
14. Present preliminary findings to internal stakeholders
15. Finalize journey maps and insights report
16. Deliver report

### Strategic Priority #3: Environmental Impact

**Strategic Priority Owner: Chief Maintenance Officer**

**Strategic Agency Goal 1a:** Establish a baseline of public awareness to the benefit of zero emission transportation (ZET) December 30, 2025.

**Strategic Agency Goal 1b:** Increase public positive awareness to the benefit of ZET from baseline to greater than 85% by August 30, 2026.

**Goal Owner:** Deputy Chief of General Services

**Goal Team Members:** Marketing/Marketing & Events Manager; Planning/Chief Planning Officer; Operations/Superintendent of Transportation; Safety/Chief Safety Officer; CEO/GM

**Cross-Functional Support Needed:**

- Marketing
- Planning
- Operations
- Safety

**Execution Plan**

1. Survey launched via American Bus Benchmarking Group (ABBG)
2. Initiate an educational campaign regarding the environmental benefit of Zero Emission Vehicles (ZEV)

### Strategic Priority #4: Safety and Security

**Strategic Priority Owner: Chief Safety Officer**

**Strategic Agency Goal 1:** Implement strategies towards achieving zero assaults (physical and verbal) of bus operators on revenue vehicles and at facilities by November 9, 2027.

**Goal Owner:** Chief Safety Officer

**Goal Team Members:** Safety/Safety Manager; Training/Senior Trainer; CEO/GM; Safety/Chief Safety Officer

**Cross-Functional Support Needed:**

- Finance
- Maintenance
- CEO/GM
- HR
- Operations
- Planning
- Marketing

**Execution Plan**

1. Identify core team members/possible others for XFI
2. Confirm XFI
3. List possible XFI, request participation and agreed upon support, confirm agreed upon support with initials
4. Develop action plan/implement

	<ol style="list-style-type: none"> <li>5. Conduct crisis awareness and de-escalation training for bus operators</li> <li>6. Install protective barriers on buses</li> <li>7. Launch community awareness campaign</li> <li>8. Conduct a midpoint progress survey</li> <li>9. Collect and analyze data from the midpoint survey</li> <li>10. Present findings from midpoint survey</li> <li>11. Conduct final survey to measure progress</li> </ol>
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**Strategic Agency Goal 2a:** Establish a baseline of customer, potential customer and community perception of SunLine’s system safety by June 20, 2026.

**Strategic Agency Goal 2b:** Improve perception of system safety/security from system from baseline to greater than 90% on the safety survey by December 30, 2028.

**Goal Owner:** Marketing and Events Manager

**Goal Team Members:** Marketing/Marketing Specialist; Facilities/Deputy Chief of Facilities; Stops and Zones/Supervisor; Safety/Safety Manager; Maintenance/Superintendent of Maintenance

**Cross-Functional Support Needed:**

- HR
- Operations
- Marketing
- Planning
- CEO/GM

**Execution Plan**

1. Identify core team members/possible others for XFI
2. Confirm XFI
3. List possible XFI, request participation and agreed upon support, confirm agreed upon support with initials
4. Develop and implement survey to establish baseline perception
5. Conduct survey among customers, potential customers, and community members
6. Collect and analyze survey data to establish baseline perception
7. Present findings from baseline survey
8. Develop action plan based on baseline survey findings
9. Implement safety and security improvements
10. Launch community awareness campaign about safety improvements
11. Conduct midpoint progress survey to measure perception changes
12. Collect and analyze data from midpoint survey
13. Present finding from midpoint survey

	<ol style="list-style-type: none"> <li>14. Monitor results and adjust action plans as needed</li> <li>15. Conduct final survey to measure perception improvement</li> </ol>
--	---

**Strategic Agency Goal 3:** Implement strategies towards achieving zero preventable vehicle collisions by November 9, 2027 (Milestones: reduce by 10% each year).

**Goal Owner:** Chief Safety Officer

**Goal Team Members:** Training/Senior Trainer; Operations/Senior Supervisor; Safety/Safety Manager, Risk Manager; Planning/Chief Planning Officer

**Cross-Functional Support Needed:**

- Operations
- Planning
- Marketing

**Execution Plan**

1. Identify core team members and possible others for XFI
2. Confirm XFI
3. List possible XFI, request participations, and confirm agreed-upon support with initials
4. Develop and implement action plan to reduce vehicle collisions
5. Conduct driver training on collision prevention and safe driving practices
6. Implement heat mapping of collision incidents to identify high-risk areas
7. Launch communications and social campaign to raise awareness about collision prevention
8. Conduct quarterly reviews of collision data and progress towards milestones
9. Monitor results and adjust action plans as needed
10. Conduct annual progress surveys to measure reduction in collisions
11. Collect and analyze data from annual surveys
12. Present findings from annual surveys

**Strategic Agency Goal 4:** Implement strategies towards achieving zero preventable passenger injuries by November 30, 2027.

**Goal Owner:** Chief Safety Officer

**Goal Team Members:** Marketing/Marketing & Events Manager; IT/IT Support Technician; Safety/Safety Manager, Risk Manager, Senior Training Supervisor

**Cross-Functional Support Needed:**

- Operations
- Marketing
- IT/Maintenance

**Execution Plan**

1. Identify CORE team members and possible others for XFI
2. Confirm XFI
3. List possible XFI, request participation, and confirm agreed upon support with initials
4. Develop and implement action plan to reduce passenger injuries
5. Conduct passenger safety training and awareness programs
6. Install and maintain security technology to enhance passenger safety
7. Launch communication and social campaign to raise awareness about passenger safety and code of conduct
8. Conduct quarterly reviews of passenger injury data and progress towards milestones
9. Monitor results and adjust action plan as needed
10. Conduct annual progress surveys to measure reduction in passenger injuries
11. Collect and analyze data from annual surveys
12. Present findings from annual surveys

## Strategic Priority #5: People/Workforce

**Strategic Priority Owner: Chief of Human Relations**

**Strategic Agency Goal 1:** Improve agency wide communication from 3.92/7 to 5.5/7 on the Voice of the Employee (VOE) survey (2024 question #25) by June 30, 2027.

**Goal Owner:** Chief of Human Relations

**Goal Team Members:** Executive Team/Chiefs, Deputy Chiefs; Management/Managers, Supervisors; Marketing Department/Marketing & Events Manager; CEO/GM

**Cross-Functional Support Needed:**

- Chiefs, Deputy Chiefs, and Managers
- Marketing Department
- CEO/GM

**Execution Plan**

1. Identify core team members/possible others for XFI
2. Identify/confirm XFI
3. List possible XFI, request participation and agreed upon support, confirm agreed-upon support with initials
4. Develop action plan/implement
5. Conduct a midpoint progress survey that is identical to the initial survey
6. Collect and analyze data
7. Present findings
8. Monitor results and adjust action plans, as needed
9. Conduct final survey
10. Repeat tasks numbers 6-8

**Strategic Agency Goal 2:** Ensure that all key positions have one or more qualified candidates to assume the roles, duties, and responsibilities of executive leadership positions as measured by a score of 4 or 5 on the readiness scale by June 30, 2030.

**Goal Owner:** Chief of Strategic Alignment

**Goal Team Members:** Human Resources/Chief of Human Relations, Human Resources Manager; Strategic Alignment/Staff Development Coordinator; Department Representatives (as needed)

**Cross-Functional Support Needed:**

- HR
- All Departments

**Execution Plan**

1. Identify core team members/possible others for XFI; steering committee
2. ID and confirm XFI
3. List possible XFI; request participation and agreed upon support, confirm with initials
4. Develop plan and define process: ID and Prioritize positions for inclusion based on business strategy requirements
5. Define position requirements vis-à-vis the implication of agency short/long term strategy
6. Assess available talent and identify high-potential employees
7. Assess development needs
8. Implement programs to develop skills, experience, and knowledge
9. Benchmark external candidates
10. Make selection(s) as needed

**Strategic Agency Goal 3:** Improve on perception of transparency between management and staff as measured by an increase from 4.65/7 to 5.5/7 (an improvement of 6.5%) on the VOE Survey (2024 question #26) by December 30, 2026.

**Goal Owner:** Chief of Human Relations

**Goal Team Members:** Marketing/Marketing & Events Manager; Union/Shops Stewards; Various Department Supervisors (as needed); CEO/GM

**Cross-Functional Support Needed:**

- CEO/GM
- Marketing
- Stewards
- Managers/Supervisors

**Execution Plan**

1. Identify core team members/possible others for XFI
2. Identify/confirm XFI
3. List possible XFI, request participation and agreed upon support, confirm agreed-upon support with initials
4. Develop action plan/implement
5. Conduct a midpoint progress survey that is identical to the initial survey
6. Collect and analyze data
7. Present findings
8. Monitor results and adjust action plans, as needed
9. Conduct final survey
10. Repeat tasks numbers 6-8

**Strategic Agency Goal 4:** Increase employee perception of participation in decision-making from 4.65/7 to a 5.5/7 (an improvement of 6.5%) on the VOE Survey (2024 question #11b) by December 30, 2026.

**Goal Owner:** Chief of Human Relations

**Goal Team Members:** Executive Team/Chiefs, Deputy Chiefs; Management/Managers, Supervisors; CEO/GM

**Cross-Functional Support Needed:**

- Chiefs and Deputy Chiefs
- Managers
- CEO/GM

**Execution Plan**

1. Identify core team members/possible others for XFI
2. Identify/confirm XFI
3. List possible XFI, request participation and agreed upon support, confirm agreed-upon support with initials
4. Develop action plan/implement
5. Conduct a midpoint progress survey that is identical to the initial survey
6. Collect and analyze data
7. Present findings
8. Monitor results and adjust action plans, as needed
9. Conduct final survey
10. Repeat tasks numbers 6-8

**Strategic Agency Goal 5a:** Improve employee productivity by decreasing unscheduled motor coach and paratransit operator absences by 50% from baseline by December 30, 2026 (limited to Operations).

**Goal Owner:** Chief of Human Relations

**Goal Team Members:** Finance/Financial Analyst; Operations/Superintendent of Transportation, Operations System Specialist, Paratransit Manager, Fixed Route Shop Steward, Deputy Chief of Transit Operations, Deputy Chief of Transit Systems and Technology; Human Resources/Human Resources Manager

**Cross-Functional Support Needed:**

- Operations
- Finance
- HR

**Execution Plan**

1. Identify core team members/possible others for XFI
2. Identify/confirm XFI
3. List possible XFI; request participation and agreed upon support, confirm agreed-upon support with initials
4. Identify root cause following principles of root cause analysis:
  - Define, Measure, Analyze, Improve and Control (DMAIC)
  - 5 Whys
  - Fish Bone
5. Prioritizing the results from root cause analysis
6. Develop action plan/implement
7. Monitor results adjust action plans, as needed

**Strategic Agency Goal 5b:** Improve employee productivity by reducing workers compensation claims from 118 CY 2024 to less than 100 for CY 2026.

**Goal Owner:** Chief of Human Relations

**Goal Team Members:** Safety/Senior Training Supervisor, Risk Manager, Safety Manager, Chief Safety Officer; Finance/Financial Analyst; Operations/Superintendent of Transportation, Operations Systems Specialist, Senior Supervisor, Deputy Chief of Transit Operations, Deputy Chief of Transit Systems and Technology, Lead Controller; Human Resources/Human Resources Manager; Maintenance/Deputy Chief of Maintenance

**Cross-Functional Support Needed:**

- Operations
- Safety/Risk
- Finance
- Training
- HR
- Athens
- Maintenance

**Execution Plan**

1. Identify core team members/possible others for XFI
2. Identify/confirm XFI
3. List possible XFI, request participation and agreed upon support, confirm agreed-upon support with initials
4. Identify root cause following principles of root cause analysis
  - DMAIC
  - 5 Whys
  - Fish Bone
5. Prioritizing the results from root cause analysis
6. Develop action plan/implement
7. Monitor results adjust action plans, as needed

**Strategic Agency Goal 6:** Develop an updated performance management process by December 31, 2025.

**Goal Owner:** Chief of Human Relations

**Goal Team Members:** Strategic Alignment/Chief of Strategic Alignment; Human Resources/Human Resources Manager; Finance/Deputy Chief of General Services; CEO/GM

**Cross-Functional Support Needed:**

- IT
- CEO/GM

**Execution Plan**

1. Identify core team members/possible others for XFI
2. Identify/confirm XFI
3. List possible XFI, request participation and agreed upon support, confirm agreed-upon support with initials
4. Insight Workplan and request for additional funds presented to the Board of Directors.
5. Drill Down Meetings with Insight
6. Evaluation systems demo, procurement process, selection
7. Goal cascading and training
8. Selected system setup, system training
9. Go live
10. Quality Assurance to ensure proper use and application for its intended use

## Strategic Priority #6: Resource Acquisition, Allocation, and Management

**Strategic Priority Owner: Chief Finance Officer**

**Strategic Agency Goal 1:** Increase revenue from grants and sales as measured by meeting our fiscal year obligations without the use of long term funds (LTF) reserves to be completed by the end of each fiscal year (ongoing).

**Goal Owner:** Chief Financial Officer

**Goal Team Members:** Finance/Financial Analyst, Accounting & Financial Reporting Manager, Grants Analyst; Capital Projects/Chief of Capital Projects; CEO/GM

**Cross-Functional Support Needed:**

- Legislative
- CEO/GM
- Planning

**Execution Plan**

1. Revenue Identification
2. Yearly Budget Approval
3. Competitive Grant Application Submittals

**Strategic Agency Goal 2:** Establish a 10-year long term financial plan that balances transportation needs with available resources and prioritizes long-term sustainability in alignment with long-term operating and capital needs identified through the planning process to be completed by December 31, 2025.

**Goal Owner:** Chief Financial Officer

**Goal Team Members:** Finance/Financial Analyst; Planning/Planning Manager Strategic and Analytics, Transit Planning Analyst; Marketing/Marketing & Events Manager

**Cross-Functional Support Needed:**

- Planning
- Chiefs

**Execution Plan**

1. Complete revenue/subsidy projections
2. Complete operating expense projections
3. Complete capital expense projections
4. Complete initial draft of revenue and expense projections
5. Review draft with executive Team
6. Present to the Board of Directors

**Strategic Agency Goal 3a:** Establish a comprehensive list of system-wide fixed assets in the agency’s enterprise asset management system to be completed by July 31, 2025.

**Strategic Agency Goal 3b:** Establish a focus on state of good repair through the capital investment planning process to ensure that no more than 10% of all system wide assets exceed their useful life benchmark by December 30, 2027.

**Goal Owner:** Chief Planning Officer

**Goal Team Members:** Capital Projects/Chief of Capital Projects; Finance/Chief Financial Officer; Planning/Planning Manager-Strategic Planning and Analytics, Transit Planning Analyst

**Cross-Functional Support Needed:**

- Capital Projects
- Finance

**Execution Plan**

1. Hire transit asset management analyst
2. Audit Hexagon software for existing data
3. Work with Maintenance and Finance to determine assets and information to include in Hexagon
4. Audit data and include reviews by different departments
5. Revise and update information as necessary and finalize data in hexagon along with SOPs to maintain data integrity moving forward
6. Complete capital expense projections
7. Include capital requirements in 10-year financial plan

**Strategic Agency Goal 4:** Achieve 100% of resource requests align with the agency’s strategic plan (ongoing).

**Goal Owner:** Chief Financial Officer

**Goal Team Members:** Planning/Chief Planning Officer; Human Resources/Chief of Human Relations; Strategic Alignment/Chief of Strategic Alignment; CEO/GM

**Cross-Functional Support Needed:**

- Planning
- HR
- CEO/GM

**Execution Plan**

1. Require written justification for alignment with strategic plan along with yearly capital and operating funding requests

## Background

### Plan Development

Arriving at the three-year strategic priorities was a multi-step process. The agency gathered data and selected priorities from many sources including organizational and employee assessments, regulatory mandates, Board presentations, annual employee engagement surveys, customer surveys, and more. Guided by the agency's mission, vision, and values, SunLine Transit prioritized themes that reflected both employee feedback and the SWOT<sup>2</sup> analysis. SunLine Transit evaluated those finalists against the guideposts for decision-making. From there, SunLine Transit's leadership team reached a consensus on the five most critical agency-wide priorities that provide a solid foundation for the agency's continued advancement.

### Organizational and Employee Assessment

An organizational and employee assessment was conducted by Insight Strategies, Inc. (Insight) on behalf of SunLine Transit. Nearly 100 SunLine Transit employees participated in the oral strategic planning assessment and 42 employees participated in the written strategic planning survey assessment. The purpose of the assessment was to elicit input to shape and inform SunLine Transit's strategic plan and assess the current state of SunLine Transit's leadership team effectiveness and opportunities for alignment.

### The Impact of Culture + SunLine Transit's Desired Culture

Describing a company's culture is like describing an individual's personality. It's a combination of the ethics, values, perceptions, atmosphere, practices, attitudes, and beliefs shared by a company's employees. In simple terms, a company's culture is "the way we do things around here."

The key to transforming a strategic plan from theory to successful implementation is culture. Concurrent with this process and informed by the organizational and employee assessments, SunLine Transit identified its current culture and defined its desired culture. Building upon what SunLine Transit already does well, the strategic plan seeks to make SunLine Transit an ideal work environment, focusing on:

- Communication
- Accountability
- Increasing innovation and creativity
- Collaboration
- Learning and Development

## **Guidepost for Decision-Making**

A guidepost for decision-making is a compass and helps teams and individuals prioritize decisions and actions. When used properly the guidepost:

- Facilitates alignment of team output
- Provides a framework for discussion, disagreement, and complex decision making
- Reduces confusion
- Saves time

*SunLine Transit's Guidepost for Decision Making is as follows...*

- What's best for SunLine vs. a department or person
- 3-5 year horizon
- Regulatory Mandates & Compliance
- Protects and supports SunLine's brand reputation
- Supports mission and vision
- Short-term and long-term health & stability of the agency

## **SWOT<sup>2</sup> Analysis**

A SWOT<sup>2</sup> analysis is a strategic planning tool that helps organizations evaluate their strengths, weaknesses, opportunities, and threats. It provides a comprehensive overview of the internal and external factors that can impact the success of a business or project. SWOT analysis provides a structured framework for organizations to evaluate their current position, make informed decisions, and develop effective strategies to achieve their goals.

## **Leadership and Board Workshops**

A total of ten workshops were facilitated by Insight. The outcomes of these workshops include a guidepost for strategic decision-making, a revised mission statement, a vision statement, strategic priorities, agency goals, cross-functional interdependency agreements, and more. This document summarizes the outcomes of the ten workshops.



[www.sunline.org](http://www.sunline.org)

## SunLine Services Group

**DATE:** June 25, 2025 **ACTION**

**TO:** Taxi Committee  
Board of Directors

**FROM:** Luis Garcia, Chief Financial Officer

**RE:** Adoption of the Fiscal Year 2026 SunLine Regulatory Administration Budget

---

### **Recommendation**

Recommend that the Board of Directors (Board) adopt the proposed fiscal year 2026 (FY26) budget.

### **Background**

In accordance with the SunLine Services Group (SSG) Joint Powers Agreement, the Board is required to approve an annual budget for the SunLine Regulatory Administration (SRA). The draft FY26 budget was presented to the Board on May 28, 2025 for review and discussion in advance of approval in June. No changes have been made to the draft budget since it was presented.

The proposed FY26 SRA budget is balanced at \$224,425. Revenue projections are based on regulatory oversight of four (4) taxi businesses. The expenditure plan reflects a fiscally responsible approach, with conservative estimates across all expense categories.

### **Financial Impact**

The proposed budget is funded by anticipated revenues derived from regulatory fees, in alignment with the authority granted to SRA under the SSG Ordinance 2025-02.

### **Performance Goal**

**Goal 3: Organizational Health & Resiliency** – Optimize SunLine’s fiscal and overall organizational strength to allow for growth and to better withstand unexpected challenges (e.g., COVID-19 financial impact).

### **In Collaboration with:**

Paul Mattern, Chief Planning Officer  
Jill Plaza, Taxi/Contracted Transportation Services Administrator

**Approved/Reviewed by:**

Mona Babauta, CEO/General Manager  
Catherine J. Groves, General Counsel

Attachment:

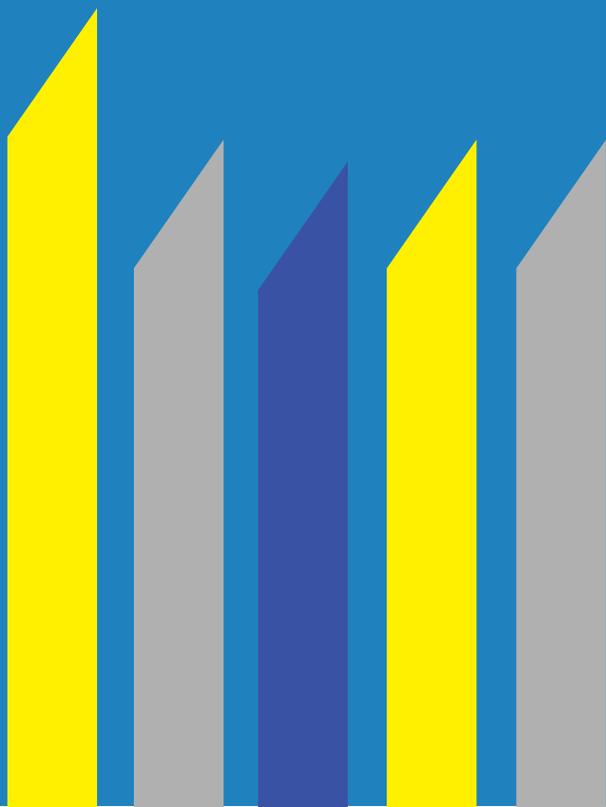
- [Item 15a](#) – FY26 SRA Budget

# ANNUAL BUDGET



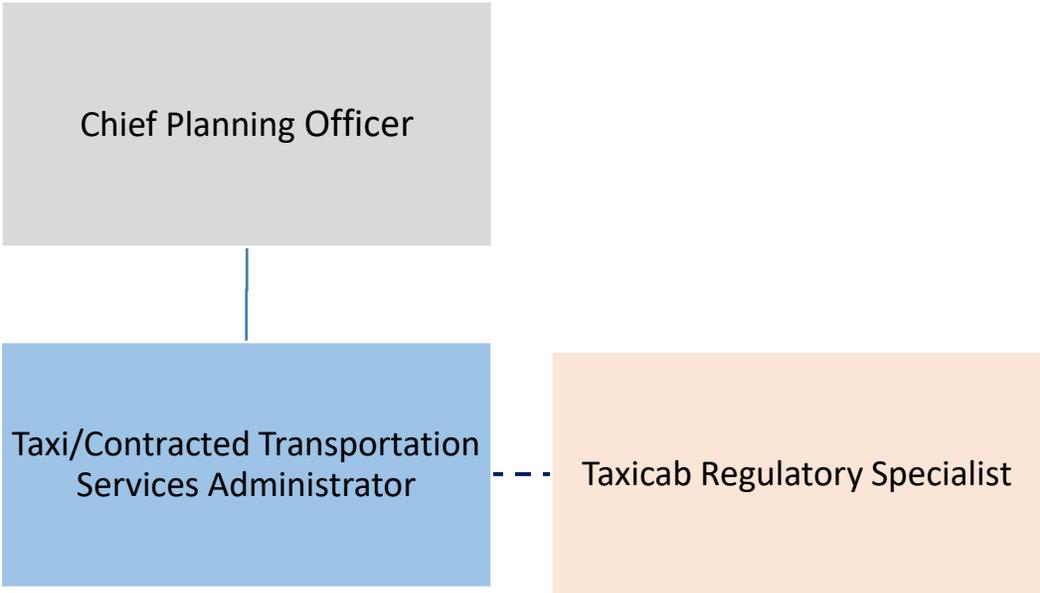
SUNLINE REGULATORY ADMINISTRATION

FY 2026



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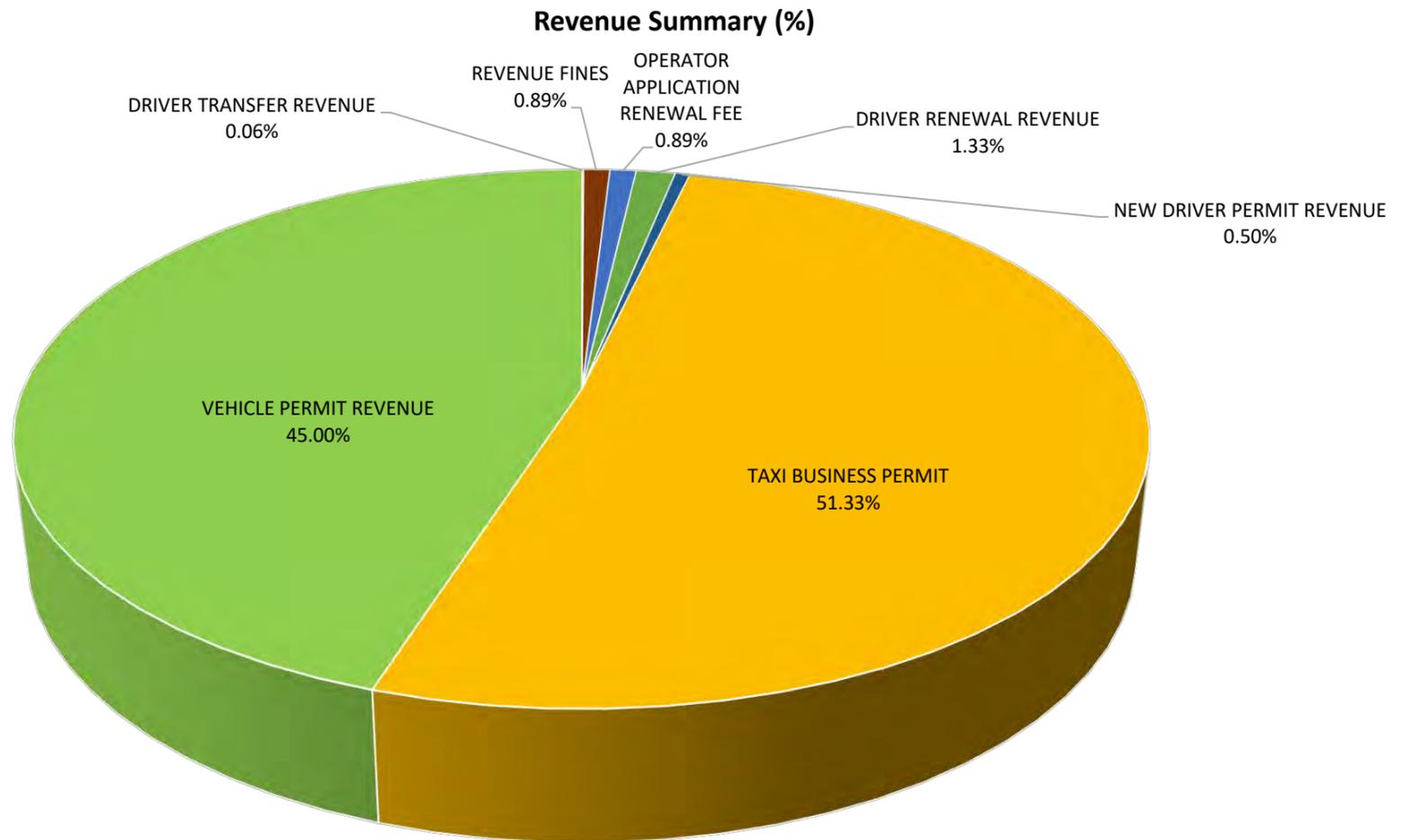




## **FUNCTIONS & RESPONSIBILITIES**

The SRA is responsible for the day-to-day oversight of the taxi and other regulated transportation-type industries by ensuring it operates smoothly and according to the established rules. Specific functions include: issuing annual licenses for taxi companies, granting permits for individual vehicles and drivers, and making sure companies comply with SSG ordinance and regulations. The SRA investigates complaints filed against taxi companies or drivers and takes disciplinary action, when warranted, like suspending or revoking permits/licenses for violations. The SRA Taxicab Administrator handles adjudication of ordinance violations. These can involve taxi companies, licenses, or driver permits.

## REVENUE SUMMARY



Sources of Funding (Operating)	FY25 Approved Budget	FY25 Estimates	FY25 Variance	FY26 Proposed Budget	FY26 Variance
4010101200 REVENUE FINES	3,500	2,450	(1,050)	2,000	(1,500)
4010101500 NEW DRIVER PERMIT REVENUE	750	1,800	1,050	1,125	375
4010101550 TAXI BUSINESS PERMIT	96,000	118,379	22,379	115,200	19,200
4010101600 DRIVER TRANSFER REVENUE	125	250	125	125	-
4010101700 DRIVER RENEWAL REVENUE	1,725	2,450	725	2,975	1,250
4010101750 DRIVER PERMIT REINSTATEMENT/REPLACEMENT	-	40	40	-	-
4010101900 VEHICLE PERMIT REVENUE	86,000	109,474	23,474	101,000	15,000
4010102205 OPERATOR APPLICATION RENEWAL FEE	1,500	-	(1,500)	2,000	500
<b>Total Revenue</b>	<b>189,600</b>	<b>234,843</b>	<b>45,243</b>	<b>224,425</b>	<b>34,825</b>

**Notes:**

- The FY25 variance reflects the difference between FY25 estimated actuals and FY25 approved budget. The FY26 variance indicates the difference between FY26 proposed budget and FY25 approved budget.

## Taxi Fees

Taxi fees are approved in a yearly resolution which is approved at the February Board meeting. The approved fees are evaluated to ensure any increases are reasonably imposed solely to recover the actual costs of regulating taxicabs within the Coachella Valley. The following represents the approved fees for Fiscal Year 2026 used in the calculation of the proposed budget.

Fees	FY25 Approved Fees	FY26 Proposed Fees	Variance
New Taxicab Business Application Fee	1,000	1,000	-
Annual Taxicab Business Permit Renewal Application Fee	500	500	-
Annual Taxicab Business Permit Fee	32,000	28,800	(3,200)
Business Permit Reinstatement Fee	10,000	10,000	-
New Driver Permit	75	75	-
Driver Permit Renewal	25	25	-
Driver Permit Transfer Fee	25	25	-
Driver Permit Reinstatement Fee	25	25	-
Driver Permit Replacement	10	10	-
Annual Vehicle Permit (Gasoline/Diesel)	1,650	1,485	(165)
Annual Vehicle Permit (Hybrid1/Alt Fuel2)	850	765	(85)
Annual Vehicle Permit (WAV3/Zero Emission4)	200	180	(20)
Vehicle Fee, Reinstatement	65	65	-
Late Fee (for late payment of invoices)	25	25	-
Appeal Fee	100	100	-
Taxicab Distinct Appearance Determination Appeal Fee	1,200	1,200	-

### Notes:

- “Hybrid” means Hybrid Electric/Gas Vehicle (HEV) and Plug-in Electric/Gas Hybrid Vehicle (PHEV)
- “Alt Fuel” means alternative fuel vehicles that use Compressed Natural Gas (CNG), Biodiesel, or Ethanol (E85) fuel blends to operate
- “WAV” means wheelchair accessible vehicle that has the ability to load wheelchair users safely and without the need for the wheelchair user to leave their wheelchair.
- “Zero Emission” means Electric Vehicles (EV) and Hydrogen-Powered Fuel-Cell Vehicles (FCEV)
- Late fees shall be assessed at \$25.00 per day, not to exceed \$1,000 per occurrence

**SUNLINE SERVICES GROUP**

**EXPENSE SUMMARY**

General Ledger Code	FY23 Actuals	FY24 Actuals	FY25 Estimated Actuals	FY25 Approved Budget	FY26 Proposed Budget	Variance
5010201600 ADMIN SALARIES	28,356	31,581	34,506	50,324	53,344	3,020
5010700000 ALLOCATED SALARIES	29,875	34,709	30,125	38,045	39,186	1,141
5029999999 TOTAL FRINGE BENEFITS	27,398	37,890	39,701	61,290	64,968	3,678
5030103240 BACKGROUND CHECK SERVICES	1,544	1,615	2,776	1,225	1,225	-
5030200000 PUBLIC NOTICES	-	-	-	90	150	60
5030300005 LEGAL SERVICES - GENERAL	12,838	5,390	40,200	7,000	25,000	18,000
5030300010 COMPUTER/NETWORK SUPPORT	-	3,119	-	-	-	-
5030303310 AUDIT SERVICES - EXTERNAL	7,000	7,000	7,000	7,000	7,000	-
5030400000 TEMPORARY HELP SERVICES	13,230	-	-	1,000	1,000	-
5030500000 MAINTENANCE CONTRACTS	263	321	1,562	500	600	100
5039900006 OUTSIDE REPAIRS-TAXI	-	-	-	1,000	1,000	-
5039903800 OTHER SERVICES	725	500	650	500	500	-
5040101000 FUEL-CNG	200	-	-	400	400	-
5040404300 OFFICE SUPPLIES	1,966	1,703	997	2,000	1,838	(162)
5040404340 ALLOCATED OVERHEAD	-	-	20,372	-	15,879	15,879
5049900002 POSTAGE	120	46	208	110	110	-
5049900026 FACILITY MAINTENANCE	573	240	-	575	575	-
5049900032 REPAIR PARTS- TAXI VEHICLES	-	-	-	500	500	-
5050200001 UTILITIES	4,320	1,875	-	4,500	-	(4,500)
5050200003 TRASH PICK-UP	502	209	-	502	-	(502)
5050200006 COMMUNICATIONS	800	333	-	800	-	(800)
5060100000 INSURANCE-PHYSICAL DAMAGE	312	130	-	312	-	(312)
5060300000 INSURANCE-GENERAL LIABILITY	2,177	907	-	2,177	-	(2,177)
5060401000 INSURANCE PREMIUM WC	3,100	1,292	-	3,100	-	(3,100)
5079900000 FUEL TAXES	-	-	-	50	50	-
5090100000 DUES, MEMBERSHIPS & SUBSCRIPTIONS	684	700	-	1,500	1,500	-
5090200000 TRAVEL AND TRAINING	1,631	1,550	-	4,000	8,500	4,500
5090801000 BANK SERVICE FEES	865	960	1,967	1,100	1,100	-
<b>Total Expenses</b>	<b>138,478</b>	<b>132,069</b>	<b>180,064</b>	<b>189,600</b>	<b>224,425</b>	<b>34,825</b>

**PERSONNEL SUMMARY**

FY26 Physical Count	Classification	FY25 Authorized FTEs	FY26 Requested FTEs	Variance
0	Chief Planning Officer	0.25	0.25	0.00
0	Taxi/Contracted Transportation Services Administrator	0.25	0.25	0.00
1	Taxicab Regulatory Specialist	1.00	1.00	0.00
<b>1</b>	<b>Total FTEs</b>	<b>1.50</b>	<b>1.50</b>	<b>0.00</b>

Notes

- The Chief Planning Officer and Taxi/Contracted Transportation Services Administrator will apportion a small percentage of payroll allocation for taxi business responsibilities.

SUNLINE SERVICES GROUP DETAIL

Division 96

General Ledger Code	FY25 Approved Budget	FY26 Proposed Budget	Variance
<b>5010201600 ADMIN SALARIES</b>	50,324	53,344	3,020
<b>5010700000 ALLOCATED SALARIES</b>	38,045	39,186	1,141
<b>5029999999 TOTAL FRINGE BENEFITS</b>	61,290	64,968	3,678
<b>Sub-total</b>	<b>149,659</b>	<b>157,498</b>	<b>7,839</b>
<b>5030103240 BACKGROUND CHECK SERVICES</b>			
Costs related to processing new applicants	1,225	1,225	-
<b>Sub-total</b>	<b>1,225</b>	<b>1,225</b>	<b>-</b>
<b>5030200000 PUBLIC NOTICES</b>			
Public Notice	90	150	60
<b>Sub-total</b>	<b>90</b>	<b>150</b>	<b>60</b>
<b>5030300005 LEGAL SERVICES - GENERAL</b>			
General counsel	7,000	25,000	18,000
<b>Sub-total</b>	<b>7,000</b>	<b>25,000</b>	<b>18,000</b>
<b>5030303310 AUDIT SERVICES - EXTERNAL</b>			
Fiscal year financial statement audit	7,000	7,000	-
<b>Sub-total</b>	<b>7,000</b>	<b>7,000</b>	<b>-</b>
<b>5030400000 TEMPORARY HELP SERVICES</b>			
Temporary Help Services	1,000	1,000	-
<b>Sub-total</b>	<b>1,000</b>	<b>1,000</b>	<b>-</b>
<b>5030500000 MAINTENANCE CONTRACTS</b>			
Copier related expenses	500	600	100
<b>Sub-Total</b>	<b>500</b>	<b>600</b>	<b>100</b>
<b>5039900006 OUTSIDE REPAIRS-TAXI</b>			
Maintenance costs for vehicles	1,000	1,000	-
<b>Sub-Total</b>	<b>1,000</b>	<b>1,000</b>	<b>-</b>
<b>5039903800 OTHER SERVICES</b>			
Board member compensation for SSG taxi committees	500	500	-
<b>Sub-total</b>	<b>500</b>	<b>500</b>	<b>-</b>
<b>5040101000 FUEL-CNG</b>			
Fuel for vehicles	400	400	-
<b>Sub-total</b>	<b>400</b>	<b>400</b>	<b>-</b>
<b>5040404300 OFFICE SUPPLIES</b>			
Office supplies	2,000	1,838	(162)
<b>Sub-total</b>	<b>2,000</b>	<b>1,838</b>	<b>(162)</b>

SUNLINE SERVICES GROUP DETAIL

Division 96

General Ledger Code	FY25 Approved Budget	FY26 Proposed Budget	Variance
<b>5040404340 ALLOCATED OVERHEAD</b>			
Allocated expenses from SunLine Transit Agency for administrative costs & overhead	-	15,879	15,879
<b>Sub-total</b>	<b>-</b>	<b>15,879</b>	<b>15,879</b>
<b>5049900002 POSTAGE</b>			
Postage and mailing expenses	110	110	-
<b>Sub-total</b>	<b>110</b>	<b>110</b>	<b>-</b>
<b>5049900026 FACILITY MAINTENANCE</b>			
Allocation from SunLine Transit Agency for materials required to maintain the building	575	575	-
<b>Sub-total</b>	<b>575</b>	<b>575</b>	<b>-</b>
<b>5049900032 REPAIR PARTS- TAXI VEHICLES</b>			
Anticipated repair costs for aging vehicles	500	500	-
<b>Sub-total</b>	<b>500</b>	<b>500</b>	<b>-</b>
<b>5050200001 UTILITIES</b>			
Allocation from SunLine Transit Agency for utilities used for the administration building	4,500	-	(4,500)
<b>Sub-total</b>	<b>4,500</b>	<b>-</b>	<b>(4,500)</b>
<b>5050200003 TRASH PICK UP</b>			
Allocation from SunLine Transit Agency for trash removal services	502	-	(502)
<b>Sub-total</b>	<b>502</b>	<b>-</b>	<b>(502)</b>
<b>5050200006 COMMUNICATIONS</b>			
Cellular services	800	-	(800)
<b>Sub-total</b>	<b>800</b>	<b>-</b>	<b>(800)</b>
<b>5060100000 INSURANCE-PHYSICAL DAMAGE</b>			
Allocation from SunLine Transit Agency for insurance related to vehicles	312	-	(312)
<b>Sub-total</b>	<b>312</b>	<b>-</b>	<b>(312)</b>
<b>5060300000 INSURANCE-GENERAL LIABILITY</b>			
Allocation from SunLine Transit Agency for defense and indemnity coverage relating to covered occurrences under general liability insurance	2,177	-	(2,177)
<b>Sub-total</b>	<b>2,177</b>	<b>-</b>	<b>(2,177)</b>

SUNLINE SERVICES GROUP DETAIL

Division 96

General Ledger Code	FY25 Approved Budget	FY26 Proposed Budget	Variance
<b>5060401000 INSUARANCE PREMIUM WC</b>			
Allocation from SunLine Transit Agency for workers compensation premium costs	3,100	-	(3,100)
<b>Sub-total</b>	<b>3,100</b>	<b>-</b>	<b>(3,100)</b>
<b>5079900000 FUEL TAXES</b>			-
Fuel tax expenses	50	50	-
<b>Sub-total</b>	<b>50</b>	<b>50</b>	<b>-</b>
<b>5090100000 DUES, MEMBERSHIPS &amp; SUBSCRIPTIONS</b>			
Annual International Association of Transportation Regulators (IATR) membership	1,500	1,500	-
<b>Sub-total</b>	<b>1,500</b>	<b>1,500</b>	<b>-</b>
<b>5090200000 TRAVEL AND TRAINING</b>			
International Association of Transportation Regulators Conference	4,000	8,500	4,500
<b>Sub-total</b>	<b>4,000</b>	<b>8,500</b>	<b>4,500</b>
<b>5090801000 BANK SERVICE FEES</b>			
Merchant Charges on Credit Cards	1,100	1,100	-
<b>Sub-total</b>	<b>1,100</b>	<b>1,100</b>	<b>-</b>
<b>Total Expenses</b>	<b>189,600</b>	<b>224,425</b>	<b>34,825</b>



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## SunLine Transit Agency

**DATE:** June 25, 2025 **ACTION**

**TO:** Board of Directors

**FROM:** Greg Wildman, Chief of Strategic Alignment

**RE:** Options - Vision Statement

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### **Recommendation**

Recommend that the Board of Directors (Board) select one from among the seven (7) options below for the SunLine Transit Agency vision statement.

### **Background**

In April 2025, the proposed agency vision statement was presented to the Board for their consideration. After discussion and with several Board member's input and comments, the Board rejected the proposed vision statement and requested executive leadership revisit the issue and present at least three (3) options for it to consider at its May 2025 Board of Directors meeting.

Executive leadership has met several times since the April Board meeting to brainstorm ideas that would yield a vision statement that reflects the agency's aspirations to inform and define its future. This process was aided with a follow-up session with Teri Fischer from Insight Strategies to assist with evaluating, analyzing and refining the proposed statements and create seven (7) viable options.

### **Proposed Vision Statements**

The process yielded the current proposed options for the Agency's vision statement:

1. SunLine advances mobility to unlock tomorrow's opportunities for today's families and communities and for generations to come.
2. SunLine drives the future of mobility where safety meets innovation while empowering communities and families for generations to come.
3. SunLine breaks the mold (optional language: or redefines the standard) by advancing mobility to meet tomorrow's opportunities for generations to come.

4. Provide safe, trusted, and innovative transportation solutions that support economic vitality, enhance community engagement, and protect the Coachella Valley environment for future generations.
5. Connecting Coachella Valley's communities with tomorrow's opportunities.
6. Shaping tomorrow with smart, sustainable public transportation today.
7. Reimagining mobility for Coachella Valley's future.

Staff now presents the final draft vision statements for the Board's review and feedback.

**Financial Impact**

There is no financial impact.

**In Collaboration with:**

Mona Babauta, CEO/General Manager  
Executive Team  
Supervisors and Managers

**Approved/Reviewed by:**

Catherine J. Groves, General Counsel

**SunLine Transit Agency  
SunLine Services Group**

**DATE:** June 25, 2025 **ACTION**  
**TO:** Board of Directors  
**FROM:** Vanessa Ordorica, Clerk of the Board  
**RE:** Election of Officers

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**Recommendation**

Recommend that the Board of Directors (Board) accept nominations and elect the Chairperson and Vice-Chairperson of the Board for SunLine Transit Agency and SunLine Services Group (SunLine).

**Background**

The Joint Powers Agreement provides that the Board shall elect a Chairperson and Vice Chairperson from its members each year. Their terms last one (1) year and expire at the end of each fiscal year. SunLine's meeting by-laws do not create an automatic advancement from Vice Chairperson to Chairperson. Both roles are chosen by a majority vote of the quorum in attendance. If there is not a majority, the incumbent(s) remain in office. Each person will serve until a successor is chosen (at any time) by affirmative votes. However, the Board will automatically review and reconsider these positions at its first regular meeting in July each year.

**Financial Impact**

There is no financial impact.

**Approved/Reviewed by:**

Mona Babauta, CEO/General Manager  
Catherine J. Groves, General Counsel

Attachment:

- [Item 17a](#) – History of SunLine Transit Agency Board Officers

**SunLine Transit Agency  
SunLine Services Group  
History of Board Officers**

<b>YEAR</b>	<b>CHAIR</b>	<b>VICE-CHAIR</b>
1977-1978	A. A. McCandless (Riverside Cty)	James McPherson (Palm Desert)
1978-1979	A. A. McCandless (Riverside Cty)	James McPherson (Palm Desert)
1979-1980	A. A. McCandless (Riverside Cty)	Cole Eyraud (Desert Hot Springs)
1980-1981	A. A. McCandless (Riverside Cty)	Robert Hubbard (Rancho Mirage) Michael Wolfson (Rancho Mirage)
1981-1982	A. A. McCandless (Riverside Cty)	Michael Wolfson (Rancho Mirage)
1982-1983	Julius Corsini (Desert Hot Springs) Roger Harlow (Indio)	Roger Harlow (Indio) <i>vacant 11/82 thru 6/83</i>
1983-1984	Roger Harlow (Indio)	Richard Kelly (Palm Desert)
1984-1985	Patricia Larson (Riverside Cty)	Manuel Rios (Coachella)
1985-1986	Patricia Larson (Riverside Cty)	Manuel Rios (Coachella)
1986-1987	Richard Kelly (Palm Desert)	Yolanda Coba (Coachella)
1987-1988	Richard Kelly (Palm Desert)	Cole Eyraud (Desert Hot Springs)
1988-1989	Richard Kelly (Palm Desert)	Rena Murphy (Cathedral City)
1989-1990	Rena Murphy (Cathedral City)	Yolanda Coba (Coachella) John Pena (La Quinta)
1990-1991	Jeffrey Bleaman (Rancho Mirage)	Darwin Oakley (Indio)
1991-1992	John Pena (La Quinta)	Darwin Oakley (Indio)
1992-1993	Patricia Larson (Riverside Cty)	Richard Kelly (Palm Desert)
1993-1994	Richard Kelly (Palm Desert)	Phil Bostley (Indian Wells)
1994-1995	Phil Bostley (Indian Wells)	Sarah Di Grandi (Cathedral City)
1995-1996	Phil Bostley (Indian Wells)	Sarah Di Grandi (Cathedral City)
1996-1997	Phil Bostley (Indian Wells) Sarah Di Grandi (Cathedral City)	Sarah Di Grandi (Cathedral City) Will Kleindienst (Palm Springs)
1997-1998	Sarah Di Grandi (Cathedral City)	Roy Wilson (Riverside Cty)
1998-1999	Roy Wilson (Riverside Cty)	Percy Byrd (Indian Wells)
1999-2000	Percy Byrd (Indian Wells)	Will Kleindienst (Palm Springs)
2000-2001	Percy Byrd (Indian Wells)	Will Kleindienst (Palm Springs)
2001-2002	Will Kleindienst (Palm Springs)	Percy Byrd (Indian Wells)
2002-2003	Matt Weyuker (Desert Hot Springs)	John Pena (La Quinta) <i>[thru 11/02]</i> Richard Kelly (Palm Desert) <i>[elected 1/03]</i>
2003-2004	Richard Kelly (Palm Desert)	Don Adolph (La Quinta)
2004-2005	Richard Kelly (Palm Desert)	Don Adolph (La Quinta)
2005-2006	Richard Kelly (Palm Desert) <i>[thru 3/06]</i> Don Adolph (La Quinta) <i>[4/06 - 6/06]</i>	Don Adolph (La Quinta)
2006-2007	Mike Wilson (Indio)	Don Adolph (La Quinta)
2007-2008	Mike Wilson (Indio) <i>[thru 12/08]</i>	Bud England(Cathedral City) <i>[thru 12/08]</i>
2007-2008	Bud England (Cathedral City) <i>[1/09-6/09]</i>	Steve Pougnet (Palm Springs) <i>[1/09-6/09]</i>
2009-2010	Bud England (Cathedral City)	Steve Pougnet (Palm Springs)
2010-2011	Steve Pougnet (Palm Springs)	Eduardo Garcia (Coachella)
2011-2012	Eduardo Garcia (Coachella)	Robert Spiegel (Palm Desert)
2012-2013	Robert Spiegel (Palm Desert)	Yvonne Parks (Desert Hot Springs)
2013-2014	Glenn Miller (Indio)	Greg Pettis (Cathedral City)
2014-2015	Greg Pettis (Cathedral City)	Douglas Hanson (Indian Wells) <i>[thru 10/14]</i>

2015-2016	Kristy Franklin (La Quinta)	John J. Benoit (Riverside County)
2016-2017	Kristy Franklin (La Quinta) <i>[thru 12/16]</i>	Steven Hernandez (Coachella) <i>[7/15-6/16]</i>
2016-2017	Russell Betts (Desert Hot Springs) <i>[1/17-6/17]</i>	Russell Betts (Desert Hot Springs) <i>[6/16-12/16]</i>
2017-2018	Russell Betts (Desert Hot Springs)	Troy Strange (Indio) <i>[1/17-6/17]</i>
2018-2019	Troy Strange (Indio) <i>[thru 12/18]</i>	Troy Strange (Indio)
2018-2019	Kathleen Kelly (Palm Desert) <i>[1/19-6/19]</i>	Kathleen Kelly (Palm Desert)
2019-2020	Kathleen Kelly (Palm Desert)	Robert Radi (La Quinta) <i>[1/19-6/19]</i>
2020-2021	Robert Radi (La Quinta)	Robert Radi (La Quinta)
2021-2022	Glenn Miller (Indio)	Glenn Miller (Indio)
2022-2023	Glenn Miller (Indio)	Lisa Middleton (Palm Springs)
2023-2024	Lisa Middleton (Palm Springs)	Lisa Middleton (Palm Springs)
2024-2025	Nancy Ross (Cathedral City)	Denise Delgado (Coachella)
		Lynn Mallotto (Rancho Mirage)

**SunLine Transit Agency**

**DATE:** June 25, 2025 **INFORMATION**

**TO:** Finance/Audit Committee  
Board of Directors

**FROM:** Edith Hernandez, Director of Board and Legislative Affairs

**RE:** Award of Contract for Federal Advocacy Services

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**Background**

SunLine Transit Agency (SunLine) relies heavily on federal funding sources to support its operational, capital, and strategic initiatives. To ensure continued access to these resources and to elevate SunLine's presence at the federal level, SunLine has prioritized the development and execution of a proactive federal legislative strategy.

This approach is reflected in SunLine's 2025 Legislative Program, approved by the Board at the March 26, 2025, Joint SunLine/SunLine Services Group Board meeting. The program outlines SunLine's key policy priorities at the federal level, which include increasing transit investment, improving transportation safety, expanding workforce development opportunities, and investing in clean and resilient infrastructure.

To advance these goals, SunLine conducted a competitive Request for Proposals (RFP) process and issued RFP 25-066 to secure a qualified federal advocacy firm. Following a comprehensive evaluation process, staff selected Smith Garson, Inc. (Smith Garson) as the firm best positioned to represent SunLine's interests in Washington, D.C. Smith Garson offers deep expertise in transportation and environmental policy, strong relationships with key congressional offices and federal agencies, and a proven history of delivering results for public transit clients.

Smith Garson's scope of work will include legislative tracking and analysis, identification of federal funding opportunities, preparation of policy briefs, and direct engagement with policymakers and federal agencies. These services will enhance SunLine's ability to influence federal policy and secure funding critical to the SunLine's long-term vision.

Under the CEO/General Manager's authority, SunLine will enter into a contract with Smith Garson for a two (2) year base term, in an amount not to exceed \$8,000 per month, in a form approved by General Counsel. The annual cost for these services is \$96,000. Funding for the first year of the contract has been included in the Fiscal Year 2026 Operating Budget and will be incorporated into future budgets.

**Performance Goal**

**Goal 3: Organizational Health & Resiliency** – Optimize SunLine’s fiscal and overall organizational strength to allow for growth and to better withstand unexpected challenges. (e.g., COVID-19 financial impact).

**In Collaboration with:**

Luis Garcia, Chief Financial Officer  
Joshua Englander, Consultant (J.E. Strategies)

**Approved/Reviewed by:**

Mona Babauta, CEO/General Manager  
Catherine J. Groves, General Counsel

Attachments:

- [Item 18a](#) – Price Analysis
- [Item 18b](#) – Solicitation List



REQUEST FOR PROPOSAL  
Federal Legislative Advocacy Services  
25-066

### Price Analysis

	Smith Garson	Thorn Run Partners	Townsend
Monthly Fee	\$8,000.00	\$7,000.00	\$8,500.00

Proposal Evaluation Score	278.5	258	248.42
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	Difference	Delta
Difference between Smith Garson and Thorn Run Partners	\$1,000	12.50%
Difference between Smith Garson and Townsend's average monthly cost	\$-500	-6.25%

There was adequate price competition since four (4) proposers independently contended for the contract that is to be awarded and were all responsive to the requirements of the solicitation. After initial evaluation, three (3) proposers were asked to move forward with interviews.

Of the three (3) finalists' monthly rate between the lowest cost vendor (Thorn Run Partners) and the highest (Townsend) is 13%. The difference between the second lowest rate (Smith Garson) and the highest is 6%

Based on the findings, the average monthly rate for Smith Garson, the highest evaluated proposer, is 6.25% lower than Townsend and 12.5% higher than Thorn Run Partners.

Based on the results, it is reasonable to assume that Smith Garson understood the Scope of Work and/ or the level of effort to complete the required services. Therefore, it is determined that the prices submitted by Smith Garson are considered fair and reasonable.

  
 \_\_\_\_\_  
 Amy Gunderloy, Contract Administrator  
 4 June, 2025

**PLANETBIDS SOLICITATION LIST Federal Legislative Advocacy Services 25-066**

<b>Vendor Name</b>	<b>Address</b>	<b>City</b>	<b>State</b>	<b>Zip</b>	<b>Respondee</b>	<b>Respondee Email</b>
Smith Garson, Inc.	1150 Connecticut Ave. NW STE 730	Washington	DC	20036	Brett Garson	bgarson@smithjgarson.com
The CrisCom Company	9550 Topanga Canyon Blvd.	Chatsworth	CA	91311	Renee Missakian	renee@thecriscomcompany.com
Thorn Run Partners	100 M St SE STE 750	Washington	DC	20003	Greg Burns	gburns@thornrun.com
Townsend Public Affairs	1401 Dove Street Suite 430	Newport Beach	CA	92660	Olivia Raymond	oraymond@townsendpa.com

## SunLine Transit Agency

<b>DATE:</b>	<b>June 25, 2025</b>	<b>INFORMATION</b>
<b>TO:</b>	<b>Finance/Audit Committee Board of Directors</b>	
<b>FROM:</b>	<b>Edith Hernandez, Director of Board and Legislative Affairs</b>	
<b>RE:</b>	<b>Award of Contract for State Advocacy Services</b>	

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### **Background**

SunLine Transit Agency (SunLine) depends significantly on public funding to support its operational and capital needs, making effective legislative advocacy a vital component of SunLine's overall strategy. In alignment with its mission to enhance accessibility, sustainability, and efficiency in public transportation, SunLine has developed a comprehensive 2025 Legislative Program. This program, approved by the Board at the March 26, 2025, Joint SunLine/SunLine Services Group Board meeting, identifies core policy priorities that include increased transit funding, climate and sustainability initiatives, public safety, universal access, and regional economic development.

To implement this Legislative Program, SunLine requires professional state advocacy services to ensure its interests are effectively represented in Sacramento, particularly given the evolving political landscape and the urgency of decisions related to clean transportation, zero-emission technology, and infrastructure funding.

As part of its commitment to transparency, SunLine conducted a competitive Request for Proposals (RFP) process and issued RFP 25-082 to identify a qualified firm for state advocacy services. Following a thorough evaluation, staff selected Shaw Yoder Antwih Schmelzer & Lange (SYASL) as the firm offering the best value to SunLine. SYASL brings extensive experience in transit policy and legislative strategy, with a proven track record of success representing public agencies across California.

The scope of work will include legislative monitoring, policy analysis, development of strategic partnerships, coordination of advocacy efforts, and direct engagement with key stakeholders. SYASL's services will support the proactive action plan outlined in SunLine's Legislative Program, which includes collaboration with legislators, regional agencies, environmental organizations, and business partners. These efforts will strengthen SunLine's ability to secure necessary funding and influence policies that benefit transit riders and the broader Coachella Valley community.

Under the CEO/General Manager's authority, SunLine will enter into a contract with SYASL for a two (2) year base term in an amount not to exceed \$8,500 per month, in a form approved by General Counsel. The annual cost for these services is \$102,000.

Funding for the first year has been included in the Fiscal Year 2026 Operating Budget and will be incorporated into future budgets.

**Performance Goal**

**Goal 3: Organizational Health & Resiliency** – Optimize SunLine’s fiscal and overall organizational strength to allow for growth and to better withstand unexpected challenges (e.g., COVID-19 financial impact).

**In Collaboration with:**

Luis Garcia, Chief Financial Officer  
Joshua Englander, Consultant (J.E. Strategies)

**Approved/Reviewed by:**

Mona Babauta, CEO/General Manager  
Catherine J. Groves, General Counsel

Attachments:

- [Item 19a](#) – Price Analysis
- [Item 19b](#) – Solicitation List



RFP  
California State Legislative Advocacy Services  
25-082

### Price Analysis

Proposed Monthly Rate		
Year	EJ Thronson Consulting	Shaw Yoder Antwih Schmelzer & Lange
Year 1	5000	8500
Year 2	5000	8500
<b>Avg Monthly Fee</b>	<b>\$5,000.00</b>	<b>\$8,500.00</b>

<b>Proposal Evaluation Score</b>	<b>372</b>	<b>404</b>
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	Difference	Delta
Difference between EJ Thronson Consulting and Shaw Yoder Antwih Schmelzer & Lange	\$3,500	70%

77 Vendors were notified of this solicitation, two (2) proposers independently contended for the contract that is to be awarded and were responsive to the requirements of the solicitation.

The difference in the average monthly rate between the vendors is 70%. This variance is the same as an almost identical solicitation (25-066) held at the same time. EJ Thronson is 5% higher than the lowest price for the other solicitation, and Shaw, Yoder, Schmelzer & Lange is 3% higher than the highest price for the other solicitation.

Based on the findings, the average monthly rate for Shaw Yoder Antwih Schmelzer & Lange, the highest evaluated proposer, is the best value to the Agency.

Based on the results, it is reasonable to assume that Shaw Yoder Antwih Schmelzer & Lange understood the Scope of Work and/ or the level of effort to complete the required services. Therefore, it is determined that the prices submitted by Shaw Yoder Antwih Schmelzer & Lange are considered fair and reasonable.

Prepared by:

Amy Gunderloy, Contract Administrator  
6/4/2025

**PLANETBIDS SOLICITATION LIST California State Legislative Advocacy Services 25-082**

<b>Vendor Name</b>	<b>Address</b>	<b>City</b>	<b>State</b>	<b>Zip</b>	<b>Respondee</b>	<b>Respondee Email</b>
EJ Thronson Consulting	PO Box 255	Davis	CA	95617	Eric Thronson	eric@ejthronsonconsulting.com
Shaw Yoder Antwih Schmelzer & Lange, Inc.	1415 L Street Suite 1000	Sacramento	CA	95822	Matthew Robinson	matt@syaspartners.com

## SunLine Transit Agency

**DATE:** June 25, 2025 **INFORMATION**

**TO:** Board of Directors

**FROM:** Edith Hernandez, Director of Board and Legislative Affairs

**RE:** Legislative Update for June 2025

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### **Background**

On May 23<sup>rd</sup>, the Legislature’s fiscal committees convened for their respective suspense file hearings, during which they reviewed and took action on a total of 1,098 bills. Approximately 32% of those measures were held in committee and did not advance. Bills that moved forward to the Assembly or Senate Floor were required to pass to their second house by the June 6<sup>th</sup> “House of Origin” deadline. The Legislature is scheduled to adjourn for its summer recess on July 18<sup>th</sup> and will reconvene on August 18<sup>th</sup>. For a comprehensive overview of legislative and budget deadlines, the 2025 Legislative Calendar is available [here](#).

### ***State***

This month’s update provides a comprehensive overview of significant developments in the State Legislature and budget negotiations impacting public transit. The Governor’s May Revise proposed addressing a \$12 billion budget shortfall by reducing or eliminating key transit investments funded through the Greenhouse Gas Reduction Fund (GGRF), including cuts to the Transit Intercity Rail Capital Program (TIRCP), Low Carbon Transit Operations Program (LCTOP), and Zero-Emission Transit Capital Program (ZETCP). In response, the Senate and Assembly leadership released a joint budget framework rejecting many of these cuts and restoring over \$1 billion in transit funding. While the Cap-and-Trade reauthorization and related GGRF expenditures remain unresolved, further negotiations are expected. SunLine continues to actively advocate for dedicated and sustainable transit funding throughout this process.

To support these efforts, SunLine submitted a formal support letter on transit investments in the Cap-and-Invest plan to Governor Newsom, Senate President pro Tempore McGuire, and Assembly Speaker Rivas, with copies sent to key members of SunLine’s state legislative delegation and the California Transit Association. Additionally, SunLine, with the assistance of SYASL, is actively monitoring several bills, including the following:

- **SB 71 (Wiener) – Support:** Requires residential developments within one-half or one-quarter mile of a transit stop to be an allowed use and eligible for streamlined, ministerial approval. Also provides CEQA exemptions for residential, commercial,

and mixed-use projects on transit agency-owned land, and for certain rail facilities used exclusively by zero-emission or electric trains.

- **SB 419 (Caballero)** – *Support*: Creates a sales and use tax exemption for hydrogen fuel, reducing the operational costs for agencies using hydrogen-powered vehicles.
- **SB 752 (Richardson)** – *Support*: Extends the existing partial sales tax exemption for zero-emission bus purchases from 2026 to 2028, helping transit agencies lower vehicle procurement costs. (Held in Senate Appropriations; may be included in final budget).
- **AB 35 (Alvarez)** – *Support*: Requires expedited environmental review for clean hydrogen transportation projects through a new “clean hydrogen environmental assessment.” (Now a two-year bill.)
- **AB 394 (Wilson)** – *Support*: Enhances safety for transit workers and passengers by expanding battery protections and allowing agencies to seek restraining orders systemwide against offenders.
- **AB 476 (M. González)** – *Support*: Tackles copper wire theft by requiring scrap dealers to collect detailed seller information and mandating state licensing, increasing accountability in the recycling industry.
- **AB 339 (Ortega)** – *Watch*: Requires public agencies to give 120 days' notice to employee organizations before issuing or renewing contracts that affect represented job classifications.
- **AB 1250 (Papan)** – *Watch*: Prevents transit operators from requiring recertification for paratransit eligibility if the person's condition is unlikely to improve.

For a comprehensive overview of all bills under SunLine's review, please refer to the attached document.

### ***Federal***

Recent federal actions reflect a significant shift in transportation policy, with deep cuts proposed to transit, electric vehicle, and equity-focused programs, alongside regulatory rollbacks and new compliance conditions tied to national security and immigration. Competitive grant programs are being reduced or restructured, earmark criteria have become more restrictive, and there is a noticeable shift in focus away from climate and equity initiatives toward traditional infrastructure and defense-related investments. Amid this evolving landscape, SunLine's Congressionally Directed Spending (CDS) request for the Thousand Palms Maintenance Facility remains under active consideration, and the Agency is working to align its messaging with federal priorities such as economic resilience and job creation.

Attachment:

- [Item 20a](#) – Shaw Yoder Antwih Schmelzer & Lange State Legislative Update – June 2025

1415 L Street  
Suite 1000  
Sacramento  
CA, 95814  
916-446-4656

June 16, 2025

TO: Board of Directors  
SunLine Transit Agency

FM: Matt Robinson, Michael Pimentel & Brendan Repicky  
Shaw Yoder Antwih Schmelzer & Lange

RE: **STATE LEGISLATIVE UPDATE – June 2025**

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**General Update**

The Legislature's fiscal committees met on May 23 for their suspense file hearings. As part of these marathon hearings, the committees acted on 1,098 bills, holding 32% of them in committee. Bills that advanced to the Assembly or Senate Floor had until June 6 to pass to their second house to meet the "House of Origin" deadline. The Legislature will break for summer recess on July 18 and will return to Sacramento on August 18. For information about key legislative and budget deadlines, please see the 2025 Legislative Calendar available [here](#).

**State Budget Agreement**

Governor Newsom released his "May Revise" to the Proposed Fiscal Year (FY) 2025-26 budget on May 14. In order to address an estimated \$12 billion budget shortfall, the Governor proposed a variety of spending reductions, delays, fund shifts, and withdrawals from the State's rainy-day fund. Critically, this included proposed reductions to the formula-based Transit Intercity Rail and Capital Program (TIRCP) for Fiscal Year 2025-26, as established by the Budget Act of 2023 (AB 102 / SB 125), from \$1 billion to \$812 million.

At the same time, the Governor announced his plan to reauthorize California's Cap-and-Trade program, now renamed *Cap-and-Invest*. This program provides billions of dollars annually to the Greenhouse Gas Reduction Fund (GGRF) and funds a variety of transit programs (TIRCP, LCTOP, ZETCP). The Governor proposed to extend the program to 2045 to provide greater market certainty and align with California's existing 2045 carbon-neutrality goal, but also proposed to eliminate *all* current GGRF expenditures and programs starting in FY 2025-26, save for two: a guaranteed \$1 billion annually for High Speed Rail, and \$1.5 billion annually (rising eventually to \$1.9 billion) for CAL FIRE, an agency traditionally funded through the State's General Fund. All other programs would be subject to re-negotiation.

In other words, his "plan" could eliminate future continuous appropriations to the Low Carbon Transit Operations Program (LCTOP) and the Transit Intercity Rail and Capital Program (TIRCP), as well as eliminate \$188 million in FY 2025-26 funding for the formula-based TIRCP (as described above) and \$700

million in out-year funding for the Zero-Emission Transit Capital Program (ZETCP) committed in FYs 2026-27 through 2027-28. Continuous appropriations to the transit / housing Affordable Housing Sustainable Communities (AHSC) program would also be eliminated. In public forums, the Administration stated its intent to continue to fund transit, but with \$2.5 billion already spoken for, any funding would be at significantly lower levels. To add more bad news, instead of the Governor's proposal reassuring the market, as intended, the quarterly Cap-and-Trade auction held on May 21 was the worst performing iteration since 2021. The sale generated just \$595 million, *half* of the May auction from 2024. All of which is to say that the Governor's plan significantly overextends the state's funding commitments from the GGRF, beginning this coming fiscal year.

In response, the California Transit Association mobilized its members, including SunLine, and other allied stakeholders to defend transit investments and [advocate](#) for a Cap-and-Invest plan that honors all existing current commitments from the GGRF and at least maintains – if not increases – the level of funding to transit agencies.

So far, the advocacy has paid off. On June 9, the Senate President pro Tempore Mike McGuire (D-North Bay) and Assembly Speaker Robert Rivas (D-Salinas) announced that their two houses had reached an agreement on the FY 2025-26 state budget to serve as the Legislature's starting point for negotiations with Governor Newsom, as the three parties work to reach agreement on a final budget by the start of the fiscal year on July 1. The Legislature will continue its negotiations with Governor Newsom and will at some point introduce a "Budget Bill Jr." to adjust the budget to reflect its final agreement with the Governor.

The two-party agreement brings good news for California transit agencies, as it would reject the Governor's proposed cuts to Senate Bill 125's formula TIRCP and ZETCP as well as to TIRCP Cycle 6, restoring \$1.078 billion in GGRF for these programs. It also reduces the proposed \$1.5 billion annual commitment from the GGRF to CAL FIRE to \$500 million in FY 2025-26 and \$500 million in FY 2026-27.

Additionally, the two-party agreement would:

- Provide a \$750 million emergency loan capacity to Bay Area transit agencies "as they work through fiscal challenges until local revenues stabilize." This loan is proposed to be included in the budget in lieu of the \$2 billion ask for new transit monies championed by Senator Jesse Arreguín (D-Berkeley) and Assemblymember Mark González (D-Los Angeles) and supported by many transit stakeholders, including the California Transit Association. The budget summary notes that this loan will be available over two years and will only be made available if the agencies can demonstrate an ability to repay them. Specific terms of the loans will be finalized in budget trailer bill language.
- Provide \$132.2 million from the Air Pollution Control Fund for the Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project from a recent legal settlement with Hino Motors.

Lastly, the two-party agreement defers for now a decision on extending the Cap-and-Trade program and takes no additional action on Greenhouse Gas Reduction Fund expenditures, including for continuous TIRCP and LCTOP. Such language and additional action is expected in the months ahead, following further negotiations between the Governor and Legislature on reauthorization of the program and GGRF

expenditures. SunLine and its state advocates will continue to advocate for continued, dedicated transit funding in any eventual GGRF agreement.

### ***Bills with Positions***

#### **SB 71 (Wiener) CEQA Exemptions for Transit Projects – SUPPORT**

Co-Sponsored by the California Transit Association, this bill would extend indefinitely the current January 1, 2030 sunset date established by SB 922 (Wiener, 2022) for statutorily authorized CEQA exemptions for transit and transportation projects, add additional project-types to the list of exemptions (ferry terminals, transit operational analysis, bus stops, bus shelters), and make substantive procedural changes surrounding board actions (i.e. board process for establishing a project's cost estimate).

#### **SB 419 (Caballero) Hydrogen Fuel Sales Tax Exemption – SUPPORT**

This bill would implement a Sales and Use Tax exemption for the sale and consumption of hydrogen.

#### **SB 752 (Richardson) Zero-Emission Bus Sales Tax Exemption Extension – SUPPORT**

This bill would extend from January 1, 2026, to January 1, 2028, the partial sales and use tax exemption for zero-emission buses (ZEBs) first established in 2019 and subsequently renewed in 2022. ***This bill was held on the Senate Appropriations Suspense File. The author and sponsors are exploring including the tax exemption as part of the final budget agreement.***

#### **AB 35 (Alvarez) CEQA Review for Clean Hydrogen Transportation Projects – SUPPORT**

This bill would require applications for a discretionary permit or authorization for a clean hydrogen transportation project to be reviewed through a clean hydrogen environmental assessment. The bill would also require the lead agency to determine whether the assessment is approved and, if it is approved, issue the discretionary permit or authorization no later than 270 days after the completion of the project application. ***This is now a 2-year bill.***

#### **AB 394 (Wilson) Transit Safety – SUPPORT**

Co-Sponsored by the California Transit Association, this bill would enhance the safety and security of California's public transportation systems by strengthening protections for transit operators, employees, and passengers. The bill accomplishes this goal by expanding existing law (Penal Code Section 243.3) to protect all transit employees against battery. Further, AB 394 would empower agencies to seek a court-issued temporary restraining order against a perpetrator for a violation of Penal Code Section 243.3, and specifies that the restraining order may apply across the entirety of the transit system where the offense occurred. The Amalgamated Transit Union and the Teamsters are co-sponsors of this bill.

#### **AB 476 (M. González) Metal Theft – SUPPORT**

Co-sponsored by the City of San Jose, this bill seeks to combat the theft of copper wire – an increasing problem affecting infrastructure, construction, and transit projects. The bill would require junk dealers and recyclers to collect more detailed transaction records and provide access to these records to law enforcement. The bill also requires that people selling copper obtain a state license and increases the fine for junk dealers or recyclers who fail to follow the law.

## ***Bills of Interest***

### **SB 79 (Wiener) Transit Oriented Development**

This bill would require that a residential development proposed within one-half or one-quarter mile of a transit-oriented development stop be an allowed use on any site zoned for residential, mixed, commercial, or light industrial development. A transit-oriented development stop is defined as a site with an existing rail or bus rapid transit station, a ferry terminal, or the intersection of two or more high frequency bus stops. SB 79 also requires that the development be eligible for streamlined, ministerial approval. In addition, SB 79 exempts residential, commercial, and mixed-use projects on land owned by a public transit agency from CEQA if the project can meet certain qualifications.

### **AB 339 (Ortega) Local Public Employee Organizations: Notice Requirements**

This bill would require the governing body of a public agency, board, or commission to provide written notice to an employee organization no less than 120 days prior to issuing a request for proposals, request for quotes, or renewing or extending an existing contract to perform services that are within the scope of work of the job classifications represented by the recognized employee organization.

### **AB 810 (Irwin) Internet Website Requirements**

This bill would expand on existing law to require special districts, joint powers authorities, or other political subdivisions to maintain an internet website with a “.gov” or “.ca.gov” domain. Special districts, joint powers authorities, or other political subdivisions would have until January 1, 2031 to comply with this requirement. While these domains themselves are free, the associated downstream costs for local agencies and districts are very concerning. These include added costs to migrate to the new domain and corresponding email addresses, implementing network login changes, multi-factor authentication, encryption, website redesign, and updating public materials, social media, and more. This would result in significant costs and staff time, for arguably marginal benefits.

***This is now a 2-year bill.***

### **AB 1250 (Papan) Paratransit Operators: Recertification of Eligibility**

This bill was amended on April 10 to prohibit transit operators from requiring a person who receives, or is eligible to receive, paratransit services based on a disability or medical condition, and whose condition cannot reasonably be expected to improve, to recertify their eligibility for the services.

***For a full list of bills we are tracking for SunLine, please click [here](#).***

**SunLine Transit Agency**

**DATE:** June 25, 2025 **INFORMATION**  
**TO:** Board of Directors  
**FROM:** Mona Babauta, CEO/General Manager  
**RE:** General Manager's Report for June 2025

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**Human Resources Update*****Years of Service Recognition***

I would like to express my gratitude to the following staff members for their dedicated years of service to the organization. Their hard work and commitment have been essential in advancing our work in serving the community.

**10 Years:**

- Javed Ahmed (*Senior Alternative Fuels Technician*)

**20 Years:**

- Tamara Miles (*Chief of Human Relations*)
- Krzysztof Borowski (*Motor Coach Operator*)

**25 Years:**

- Jose Castillo (*Motor Coach Operator*)

Thank you for your outstanding contributions and dedication throughout your time at SunLine.

***New Employee Orientation – Thousand Palms, CA (June 2, 2025)***

On Monday, June 2, 2025, we held our New Employee Orientation, welcoming 13 new team members. This group included a Deputy Chief Maintenance Officer, a Utility Worker, a Paratransit Operator, and nine (9) Motor Coach Operators. We're excited to welcome these new employees to the SunLine team and look forward to the contributions they'll make in serving our community.

## **Safety Update**

### ***Transit-Paratransit Management Certificate Program – University of the Pacific***

Safety Officer, Eugene Wilson, and Safety Compliance Specialist, Craig Stodolka, successfully completed the Transit-Paratransit Management Certificate Program offered by the University of the Pacific's Westgate Center for Leadership and Management Development.

This professional development program is designed for current and aspiring managers in rural, small, and medium-sized transit and paratransit agencies. It provides essential training in:

- Transit regulations and mandates
- Leadership and management principles
- Risk management and safety
- Human resources and operations
- Budgeting and financial management
- Marketing and communication strategies

Staff completed a series of seven (7) courses, delivered in person at Orange County Transportation Authority. The program equips transportation professionals with the tools and knowledge to enhance organizational performance and ensure regulatory compliance.

### ***Transportation Safety Institute Course – Safety Management Systems (SMS) for Public Transit (May 27 – 29, 2025)***

Safety Manager, Richard Powers, attended an online comprehensive course on SMS through the Transportation Safety Institute. The training introduced the four (4) core components of SMS—Safety Management Policy, Safety Risk Management, Safety Assurance, and Safety Promotion—within the context of public transit. Participants explored the Federal Transit Administration's (FTA) SMS framework, emphasizing leadership accountability, proactive risk analysis, and fostering a positive safety culture. The course included practical exercises and tools to support SMS implementation, including the development of an effective employee safety reporting system.

Key topics included:

- Evolution of safety thinking in transit
- SMS framework and sub-components
- Strategies for SMS implementation
- Interactive assessments and group activities

SMS is a structured, risk-based approach to managing safety that integrates organizational policies, proactive hazard identification, and continuous improvement into

daily operations. It emphasizes leadership accountability, employee involvement, and data-driven decision-making to enhance safety outcomes.

While SMS is adaptable across industries, its importance in public transit lies in its ability to:

- Prevent incidents before they occur by identifying and mitigating risks early.
- Foster a strong safety culture where employees feel empowered to report concerns without fear.
- Ensure compliance with FTA safety regulations and strengthen our agency's credibility and public trust.
- Improve operational efficiency by reducing disruptions and safety-related costs.

Having staff like Richard participate in these courses ensures that SunLine is building internal expertise to implement and sustain SMS effectively. It also supports our long-term goal of embedding safety into every level of our organization, from frontline operations to executive leadership.

### ***Crisis Awareness and De-Escalation Training – Thousand Palms, CA***

As part of SunLine's commitment to fostering a safe, responsive, and inclusive environment, 102 staff members, including 43 Operators, have successfully completed Crisis Awareness and De-Escalation Training across six (6) dedicated sessions. This agency-wide initiative is strategically designed to equip employees with the skills to recognize, respond to, and effectively manage crisis situations in a calm and professional manner. The training curriculum is tailored to the unique challenges faced by transit personnel, emphasizing empathy, communication techniques, situational awareness, and non-violent conflict resolution. By investing in this proactive approach, SunLine is reinforcing its dedication to employee safety, passenger well-being, and community trust.

This milestone marks a significant step toward building a more resilient and prepared workforce, with ongoing sessions planned to ensure all staff are empowered with the tools necessary to de-escalate tense situations and support individuals in distress.

### **Community/Industry Engagement Events**

#### ***Greater Coachella Valley Chamber of Commerce (GCVCC) State of the City Cathedral City – Cathedral City, CA (May 13, 2025)***

SunLine staff attended GCVCC's 2025 Cathedral City State of the City, Business Awards, and Business Expo. The event provided an opportunity to strengthen partnerships with local businesses and community leaders while supporting regional economic development initiatives. Staff represented the Agency at the expo and engaged with attendees to share information about SunLine's services and sustainability efforts.

***Riverside University Health System Fiesta Week – Indio, CA (May 14, 2025)***

On Wednesday, May 14, 2025, our Marketing team was thrilled to participate in the lively Riverside University Health System (RUHS) Fiesta Week. This vibrant community outreach event brought together a wide range of vendors to share valuable information and resources with RUHS staff and visitors. We had the opportunity to connect with over 80 attendees, with conversations about SunLine's services and how we are helping to move the community forward.

***Zero Emissions Bus Resource Alliance (ZEBRA) Meeting – Missoula, MT (May 15 – 16, 2025)***

Chief Maintenance Officer, Mark Perry, and Alternative Fuels Program Manager, Shawn Craycraft, attended the ZEBRA meeting in Missoula, Montana from May 15 – 16, 2025, where nine (9) zero emission vendors—including Gillig, Eldorado, and Solaris—shared updates on their offerings and support for agency transitions. Staff gained several insights, including *Zero Mission*, a predictive maintenance software that monitors bus performance in real time and alerts for potential failures. The Center for Transportation and Environment (CTE) also presented a study on a hydrogen-powered bus operating without batteries, which staff will continue to monitor. Meetings like these are beneficial for staff to attend, as they provide opportunities to collaborate with stakeholders and receive real time updates from industry vendors.

***Día de los Niños – Indio Library, CA (May 17, 2025)***

On Saturday, May 17, 2025, our Marketing team participated in the Día de los Niños event to honor children in our communities and share how SunLine plays a key role in getting the community to where they need to go. The event provided a valuable opportunity to engage with about 70 community members. Along with highlighting our services, we had great conversations with families about our Haul Pass program and our youth programs, like the Youth Sustainability Committee and Student Art Contest. It was a day full of sunshine, learning, and shared commitment to a cleaner, greener future!

***Palm Springs Emergency Assistance – Palm Springs, CA (May 17, 2025)***

On Saturday, May 17, 2025, in the aftermath of the tragic bombing incident in downtown Palm Springs, our Operations and Safety team provided immediate and critical support to the emergency response efforts. We deployed two (2) buses to act as physical barricades, strategically positioning them at the intersections of Las Palmas and North Palm Canyon Drive. These buses helped block off access to the impacted area, ensuring the safety of first responders and the public. The swift coordination and responsiveness of SunLine's staff during this high-pressure situation represents the agency's dedication to public safety and our role as a dependable community partner.

***Travel Training at Riverside University Health System – Indio, CA (May 19, 2025)***

On Monday, May 19, 2025, our Marketing team conducted a travel training session at the

Riverside University Health System in Indio. This training was designed to support adults with disabilities and seniors by providing them with the tools and knowledge needed to confidently navigate SunLine's transportation system.

The session included an overview of SunLine services, with a focus on the SunDial Paratransit service and the Taxi Voucher Program. Attendees also received a guided tutorial on how to download and use SunLine's mobile applications, with hands-on assistance provided throughout.

### ***Career Day at Agua Caliente Elementary – Cathedral City, CA (June 2, 2025)***

Staff proudly participated in Agua Caliente Elementary School's Career Day, joining a diverse group of outstanding organizations from across the Valley—including the Police Department, Fire Department, medical service providers, and Riverside County. Together, we shared valuable insights into a variety of career paths, creating an engaging and memorable experience for students from Transitional Kindergarten through 5th grade.

The event was a huge success, with curious young minds eagerly exploring the SunLine Mini Bus (FC.5) and asking thoughtful questions about our organization and the unique paths that led each of us to our careers. The energy and enthusiasm of SunLine staff kept students engaged as they shared fun, practical tips on different careers at SunLine and how to ride public transit. It was a meaningful opportunity to spark curiosity and inspire the next generation of professionals.

### ***Day of the Child Event – Desert Hot Springs, CA (June 7, 2025)***

On Saturday, June 7, 2025, our Marketing team had the joy of participating in the Day of the Child celebration at the Desert Hot Springs Health and Wellness Center. SunLine connected with approximately 80 attendees, mainly elementary-aged children and their families, sharing information about our services and highlighting our annual Student Art Contest, open to students in grades K–12. Kids had a great time engaging with our booth, especially enjoying the SunLine-themed coloring books and squishy buses we handed out.

The event was filled with positive energy, thanks to the presence of other local organizations like Desert Hot Springs Animal Control, the Police Department, the Fire Department and Riverside County Office of Education CAREspace (Community, Access, Relationships and Emotional Wellness).

### ***Travel Training Presentation to Lesbians Embracing Aging – Thousand Palms, CA (June 16, 2025)***

On Monday, June 16, 2025, staff conducted a travel training presentation at SunLine for members of Lesbians Embracing Aging (LEA), a group that had reached out through Board Member Garner. The purpose of the presentation was to introduce LEA's Transportation Subcommittee to the content typically covered in our travel training

sessions, with the goal of forming a partnership to deliver similar presentations at senior centers and other community locations.

The presentation covered key topics, including SunLine's services, the SunDial Paratransit program for individuals with disabilities, the Taxi Voucher Program for seniors, and a brief tutorial on how to use our mobile apps.

SunLine and LEA will be collaborating in an effort to reach more individuals in the community who could benefit from our services. This partnership emphasizes SunLine's ongoing commitment to accessibility, community engagement, and delivering exceptional service to all riders.

### ***Student Art Contest Submission Deadline Extended to Thursday, June 26, 2025***

The submission date for SunLine's Student Art Contest has been extended to Thursday, June 26, 2025. It is a special project for the youth of our community that has been around for 10 years now. This initiative is designed to engage local youth in the arts with a focus on sustainability, clean energy, and public transportation policy.

The Student Art Contest has seen strong participation and growing interest from students across the Coachella Valley throughout the years. We kindly ask for your support in sharing this opportunity within your networks, primarily with students from K-12<sup>th</sup> grade who have a passion for the arts and public transportation. For more information and to submit artwork, visit our website: [Student Art Contest | SunLine Transit Agency](#)

### ***11th Annual Pack the Bus – Palm Desert, CA (July 17, 2025)***

Our annual Pack the Bus school supply drive will take place on Thursday, July 17, 2025. A SunLine bus will be located in front of the Walmart in Palm Desert (34-500 Monterey Avenue, Palm Desert CA) from 7:00 am to 7:00 pm. This year's beneficiary will be the Boys and Girls Club of Cathedral City, sharing the collected donations with other Boys and Girls Clubs throughout the Valley.

This event is designed to offer struggling families some relief from the high costs of back-to-school shopping, give each child the much-needed boost of confidence to succeed in the coming school year, and help teachers equip their classrooms for a year of learning.