

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"> • Finance • Strategic Alignment 	<p>operating procedures to improve efficiencies</p> <ol style="list-style-type: none"> 6. Assess and evaluate current comprehensive fleet maintenance plan 7. Continuously assess, monitor, and analyze to achieve and maintain results
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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"> 5. Conduct crisis awareness and de-escalation training for bus operators 6. Install protective barriers on buses 7. Launch community awareness campaign 8. Conduct a midpoint progress survey 9. Collect and analyze data from the midpoint survey 10. Present findings from midpoint survey 11. Conduct final survey to measure progress
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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

	14. Monitor results and adjust action plans as needed 15. Conduct final survey to measure perception improvement
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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 SWOT² 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

SWOT² Analysis

A SWOT² 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.



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