



SunLine Transit Agency/
 SunLine Services Group
 February 25, 2026
 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**

NOTICE TO THE PUBLIC

All items appearing on the agenda are subject to action by the Board of Directors. Staff recommendations are subject to action by the Board of Directors.

In compliance with the Brown Act, agenda materials distributed to the Board 72 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.

Upon request, SunLine will provide written agenda materials in appropriate alternative formats to individuals with disabilities. In addition, SunLine will arrange for disability-related modifications or accommodations, including auxiliary aids or services, to enable individuals with disabilities to participate in public meetings. Please contact the Clerk of the Board at (760) 343-3456 or send a written request by emailing clerkoftheboard@sunline.org, including your name, mailing address, telephone number and brief description of the requested materials, preferred alternative format, and/or auxiliary aid or service at least three (3) days before the meeting.

Public comments may be received either in person or via email.

In Person: Anyone wishing to speak in person during the public comment period or on a particular item is required to fill out a Request to Speak Form. In order to be recognized, a Request to Speak Form must be submitted to the Clerk of the Board prior to the start of the public comment period or before the agenda item on which comment is to be provided is taken up by the Board. Comments are limited to a total of three (3) minutes per speaker. The Board and Committee Chairs have the discretion to manage the Public Comment process in a manner that achieves the purpose of public communication and ensures the orderly conduct of the meeting.

In Writing via Email: Written comment may be submitted by emailing clerkoftheboard@sunline.org. To comment by email, submit comments no later than 5:00 PM the day before the meeting. Email comments should include the commenter's name, the agenda item being commented on (if applicable), and comment. Any correspondence received before the deadline will be forwarded to the Board of Directors for consideration

ITEM

RECOMMENDATION

before action is taken on the matter. Upon request, one (1) hard copy of the written comments will be available for public viewing. Written comments will be retained for the official records. Written comments will not be read aloud at Board or Committee meetings.

The Board has the discretion to manage the Public Comment process in a manner that achieves the purpose of public communication and assures the orderly conduct of the meeting.

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

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
December 2025

(PAGE 8-14)

<u>ITEM</u>	<u>RECOMMENDATION</u>
8b) Acceptance of Credit Card Statements for December 2025	(PAGE 15-27)
8c) Acceptance of Monthly Budget Variance Report for December 2025	(PAGE 28-33)
8d) Acceptance of Contracts Signed between \$25,000 and \$250,000 for December 2025	(PAGE 34-36)
8e) Acceptance of Union & Non-Union Pension Investment Asset Summary for December 2025	(PAGE 37-49)
8f) Acceptance of Ridership Report for December 2025	(PAGE 50-54)
8g) Acceptance of SunDial Operational Notes for December 2025	(PAGE 55-58)
8h) Acceptance of Metrics for December 2025	(PAGE 59-76)
8i) Acceptance of Board Member Attendance Report for January 2026	(PAGE 77-79)
8j) Approval of Joint Board Meeting Minutes of January 28, 2026	(PAGE 80-94)
8k) Acceptance of SSG/SRA Checks \$1,000 and Over Report for December 2025	(PAGE 95-97)
8l) Acceptance of SSG Monthly Budget Variance Report for December 2025	(PAGE 98-101)
8m) Acceptance of Taxi Trip Data Report – December 2025	(PAGE 102-104)
8n) Legislative Update for February 2026	(PAGE 105-114)
9. CHANGE ORDER TO ADD ADDITIONAL COMPENSATION TO AGREEMENT 25-003 SECURITY FENCE UPGRADE WITH THREE PEAKS CORP. (John Peña, Chair of Finance/Audit Committee/Committee of the Whole; Staff: Walter Watcher, Chief of Capital Projects)	APPROVE (PAGE 115-116)
10. AWARD OF CONTRACT 25-006 FOR ASPHALT CONCRETE PAVEMENT UPGRADE PROJECT (John Peña, Chair of Finance/Audit Committee/Committee of the Whole; Staff: Walter Watcher, Chief of Capital Projects)	APPROVE (PAGE 117-121)
11. WORKFORCE TRAINING CENTER FACILITY EQUITY ANALYSIS (Denise Delgado, Chair of Strategic Planning & Operational Committee/Committee of the Whole Staff: Greg Wildman, Chief of Strategic Alignment)	RECEIVE & FILE (PAGE 122-137)

ITEM

RECOMMENDATION

- 12. **CONTINUATION OF FISCAL YEAR (FY) 2025 SUNLINE GOALS, STRATEGIC OBJECTIVES AND PRIORITIES**
(Denise Delgado, Chair of Strategic Planning & Operational Committee/Committee of the Whole;
Staff: Greg Wildman, Chief of Strategic Alignment)
INFORMATION
(PAGE 138-229)

- 13. **RESOLUTION NO. 0100 ADOPTING PERMITTING FEES FOR TAXICAB SERVICES WITHIN THE COACHELLA VALLEY FOR FISCAL YEAR 2027**
(Glenn Miller, Chair of Taxi Committee/Committee of the Whole;
Staff: Jill Plaza, Taxi/Contracted Transportation Services Administrator)
APPROVE
(PAGE 230-235)

- 14. **CEO/GENERAL MANAGER’S REPORT**

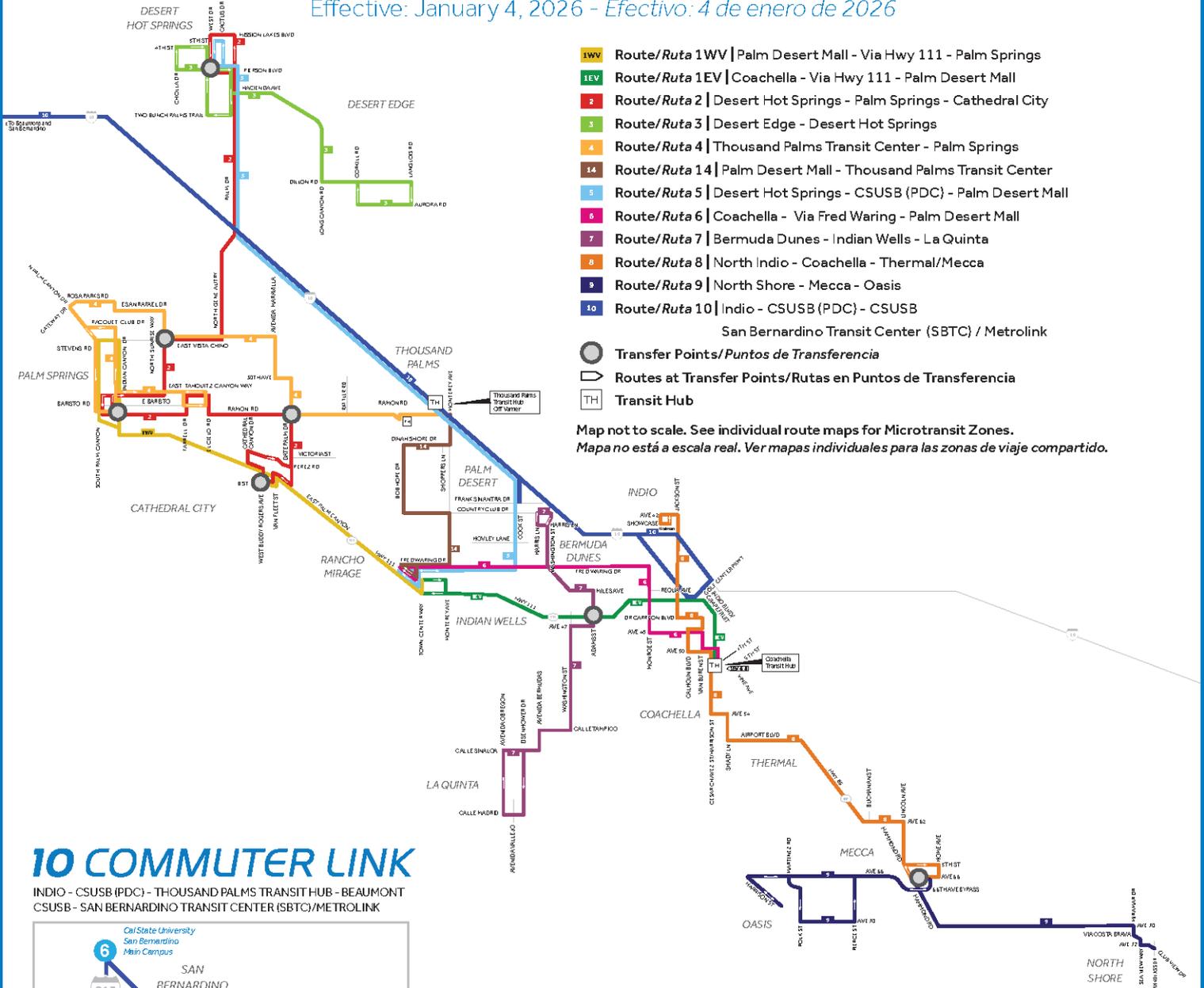
- 15. **NEXT MEETING DATE**

March 25, 2026 at 12 p.m.
Board Room
32-505 Harry Oliver Trail
Thousand Palms, CA 92276

- 16. **ADJOURN**

SYSTEM MAP - MAPA DEL SISTEMA

Effective: January 4, 2026 - Efectivo: 4 de enero de 2026



- 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 | Thousand Palms Transit Center - Palm Springs
- 14** Route/Ruta 14 | Palm Desert Mall - Thousand Palms Transit Center
- 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

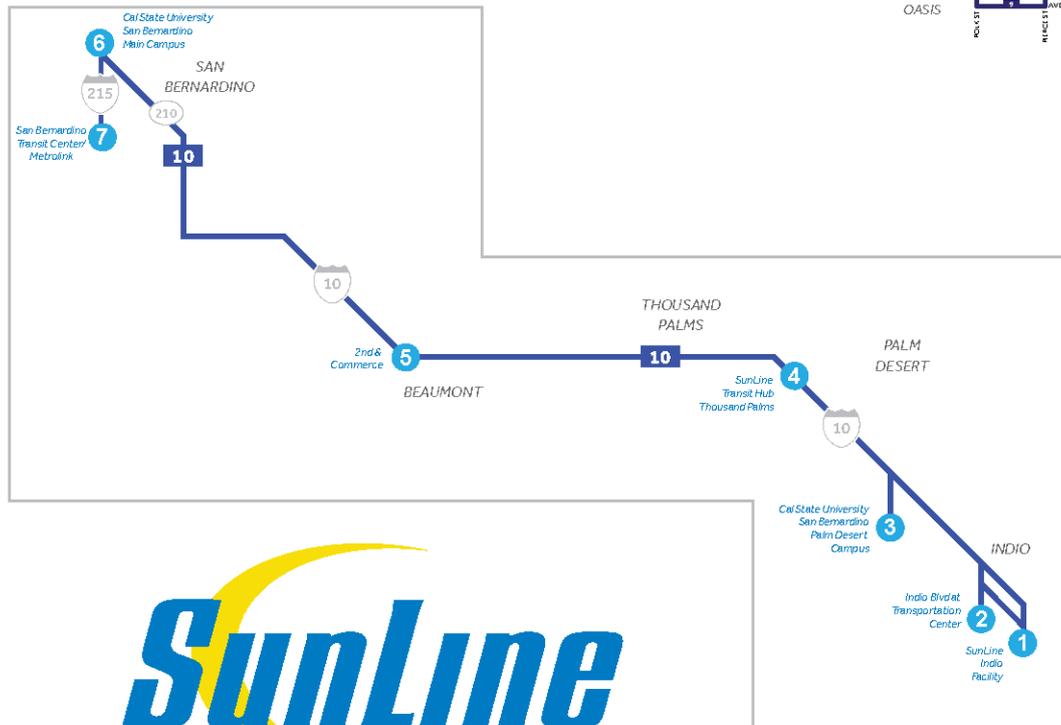
San Bernardino Transit Center (SBTC) / Metrolink

- 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

#		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
		D	
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
A		DOT	Department of Transportation
A&E	Architect and Engineering	DPSS	Department of Public Social Services
AC	Alternating Current	E	
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
		F	
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
C		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	G, H, I, J, & K	
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
		L	
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	T	
L TF	Local Transportation Fund	TAC	Technical Advisory Committee
M, N, & O		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	U, V, W, X, Y, Z	
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		
P & Q			
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		
R & S			
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		



Board Report

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Finance/Audit Committee/Committee of the Whole Board of Directors

FROM: Luis Garcia, Chief Financial Officer

SUBJECT: Acceptance of Checks \$1,000 and Over Report for December 2025

Recommendation:

Recommend that the Board of Directors (Board) approve the checks \$1,000 and Over Report for December 2025.

Background:

The Checks \$1,000 and Over Report lists all 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 December which required signature from the Chair or Vice Chair.

Vendor	Check #	Amount
<i>Integrated Cryogenic Solutions, LLC</i>	701895	\$291,419.71
<i>Cora Constructors Inc.</i>	701645	\$203,812.31
<i>Hanson Bridgett LLP</i>	701892	\$103,205.00
<i>Nomad Transit, LLC</i>	701978	\$81,758.10
<i>Atkinson, Andelson, Loya Ruud and Romo</i>	701943	\$78,046.60
<i>MetLife</i>	701839	\$53,715.88

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

N/A

Approved/Reviewed by:

Luis Garcia, Chief Financial Officer

Attachments:

- Checks \$1,000 and Over Report for December 2025

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

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
CALPERS	Group Health Premiums	701813	12/17/2025	473,196.88
INTEGRATED CRYOGENIC SOLUTIONS LLC	Fuel - Liquid Hydrogen	701895	12/22/2025	291,419.71
CORA CONSTRUCTORS INC.	WIP- Div I Back Up Generator- Project Acct#2407-00	701645	12/01/2025	203,812.31
HANSON BRIDGETT LLP	Legal Service	701892	12/22/2025	103,205.00
U.S. BANK INSTITUTIONAL TRUST-WESTERN	Pension Deposit	701865	12/17/2025	94,536.62
U.S. BANK INSTITUTIONAL TRUST-WESTERN	Pension Deposit	701702	12/03/2025	93,766.97
NOMAD TRANSIT, LLC	SunRide Ride Share Expenses	701978	12/30/2025	81,758.10
ATKINSON, ANDELSON, LOYA RUUD AND ROMO	Legal Service	701943	12/30/2025	78,046.60
IMPERIAL IRRIGATION DIST	Utilities	701833	12/17/2025	75,341.50
METLIFE	Supplement Benefits LTD/STD/LIFE/Dental Ins Premium	701839	12/17/2025	53,715.88
SO CAL GAS CO.	Utilities	701861	12/17/2025	39,709.82
MICHELIN NORTH AMERICA, INC.	Lease Tires Services	701762	12/10/2025	39,692.76
ANEW RNG, LLC	Utilities	701878	12/22/2025	35,525.02
MICHELIN NORTH AMERICA, INC.	Lease Tires Services	701962	12/30/2025	35,000.23
NFI PARTS	Inventory Repair Parts	701646	12/03/2025	33,123.08
VERIZON WIRELESS	Wireless Telephone Service	701799	12/10/2025	28,084.06
DISCOUNTCELL LLC	Computer/Network Software Agreement	701737	12/10/2025	25,286.04
HANSON BRIDGETT LLP	Legal Service	701750	12/10/2025	24,578.29
HANSON BRIDGETT LLP	Legal Service	701830	12/17/2025	24,035.25
DECALS BY DESIGN, INC.	Advertising Student Art Contest Bus Wrap	701822	12/17/2025	22,415.43
TYLER TECHNOLOGIES, INC.	Computer/Network Software Agreement	701925	12/22/2025	21,719.76
TEC EQUIPMENT, INC.	Inventory Repair Parts	701791	12/10/2025	20,018.84
JARRETT WALKER & ASSOCIATES, LLC	WIP-Comprehensive Operational Analysis-Project Act#2514-01	701681	12/03/2025	19,974.81
RUSH TRUCK CENTERS OF CALIFORNIA, INC.	Inventory Repair Parts	701916	12/22/2025	17,828.49
TODD VERWERS ARCHITECTS INC	WIP- Center of Excellence Facility- Project Acct#1808-03	701922	12/22/2025	17,455.34
AVAIL TECHNOLOGIES, INC.	Computer/Network Software Agreement	701719	12/10/2025	16,579.02
BROWN ARMSTRONG ACCOUNTANCY	Audit Services	701812	12/17/2025	16,096.25
HELIXSTORM	Contracted Services	701751	12/10/2025	15,332.60
JOSE I TORRES	Employee Agreement	701897	12/22/2025	15,000.00
BALLARD POWER SYSTEMS	WIP-Fixed Assets Hydrogen Bus-Project Acct#2401-02	701945	12/30/2025	14,120.00
TRANSPO GROUP USA, INCORPORATED	Consulting	701864	12/17/2025	13,434.25
TRUGUARD SECURITY SERVICES, INC	Security Guard Services	701795	12/10/2025	12,078.44
PRECISION ALLISON TRANSMISSIONS	Repair Parts-Fixed Route	701690	12/03/2025	11,852.50
BALLARD POWER SYSTEMS	Inventory Repair Parts	701882	12/22/2025	11,809.41
NEW FLYER OF AMERICA INC.	Computer/Network Software Agreement	701965	12/30/2025	11,700.00
PRUDENTIAL OVERALL SUPPLY	Uniforms	701691	12/03/2025	11,694.36
JASPER ENGINE EXCHANGE, INC.	Paratransit Repair Parts	701682	12/03/2025	11,428.00
NAPA AUTO PARTS	Inventory Repair Parts	701768	12/10/2025	10,664.13
ROBERT HALF	Temporary Help	701695	12/03/2025	9,802.58

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

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
COMPLETE COACH WORKS	Inventory Repair Parts	701728	12/10/2025	9,356.17
DYNAMIC BUILDING MAINTENANCE INC	Janitorial Services	701951	12/30/2025	9,349.00
DYNAMIC BUILDING MAINTENANCE INC	Janitorial Services	701738	12/10/2025	9,349.00
PRUDENTIAL OVERALL SUPPLY	Uniforms	701853	12/17/2025	9,254.10
FRANKLIN TRUCK PARTS, INC	Inventory Repair Parts	701743	12/10/2025	9,065.92
RWC GROUP	Inventory Repair Parts	701674	12/03/2025	9,013.31
TPX COMMUNICATIONS	Communication Service	701794	12/10/2025	8,703.19
ROBERT HALF	Temporary Help	701856	12/17/2025	8,591.60
NFI PARTS	Inventory Repair Parts	701710	12/10/2025	8,508.26
SHAW YODER ANTWIH SCHMELZER & LANGE, INC	Consulting	701784	12/10/2025	8,500.00
SMITH GARSON, INC.	Consulting	701786	12/10/2025	8,000.00
BLAIS & ASSOCIATES, LLC	Consulting	701883	12/22/2025	7,767.00
GILLIG LLC	Inventory Repair Parts	701891	12/22/2025	7,720.01
ROMAINE ELECTRIC CORP.	Inventory Repair Parts	701857	12/17/2025	7,696.25
JE STRATEGIES LLC	Consulting	701756	12/10/2025	7,500.00
COAST COMPRESSOR COMPANY	Inventory Repair Parts	701725	12/10/2025	7,196.64
AMALGAMATED TRANSIT UNION	Union Dues	701650	12/03/2025	7,107.52
MAKAI SOLUTIONS	WIP-Fixed Assets-Facility Improvements- Project Acct#2413-19	701899	12/22/2025	6,959.19
AMALGAMATED TRANSIT UNION	Union Dues	701807	12/17/2025	6,919.47
ROBERT HALF	Temporary Help	701973	12/30/2025	6,591.60
ROBERT HALF	Temporary Help	701915	12/22/2025	6,412.44
HELIXSTORM	Contracted Services	701893	12/22/2025	6,325.00
ANDREA CARTER & ASSOCIATES	Marketing & Communication Services	701809	12/17/2025	6,195.00
MOWERS PLUS, INC.	WIP-Fixed Assets- Misc Equipment- Project Acct#2310-08	701906	12/22/2025	6,033.98
CITY CAB	Taxi Voucher Program	701974	12/30/2025	5,841.80
AMAZON CAPITAL SERVICES, INC	Facility Maintenance	701714	12/10/2025	5,530.41
SONSRAY FLEET SERVICES	Inventory Repair Parts	701793	12/10/2025	5,508.32
BATTERY RUSH	Bus Stop Supplies	701946	12/30/2025	5,104.80
G/M BUSINESS INTERIORS	WIP-Fixed Assets- Office Furn & Equip- Project Acct#2418-16	701747	12/10/2025	5,008.29
CUSTOM INDUSTRIES INC.	Inventory Repair Parts	701949	12/30/2025	4,766.16
CUSTOM INDUSTRIES INC.	Inventory Repair Parts	701730	12/10/2025	4,766.16
MARIO FIGUEROA	Reimbursement Expense	701937	12/24/2025	4,765.82
ROBERT HALF	Temporary Help	701780	12/10/2025	4,684.59
IMPERIAL IRRIGATION DIST	Utilities	701894	12/22/2025	4,570.90
MAGALDI & MAGALDI, INC.	Inventory Repair Parts	701684	12/03/2025	4,312.41
AMERICAN MOVING PARTS	Inventory Repair Parts	701877	12/22/2025	4,297.86
CASTAÑEDAS MEXICAN FOOD	SunLine Events Expense	701707	12/08/2025	4,217.98
CALSTART, INC.	Membership & Subscriptions	701656	12/03/2025	3,950.00
AMERICAN MOVING PARTS	Inventory Repair Parts	701652	12/03/2025	3,887.26

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

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
ISAAC RODRIGUEZ	Reimbursement Expense	701935	12/24/2025	3,814.25
WINDMILL CITY SCREEN PRINTING	SunLine Events Expense	701705	12/03/2025	3,539.07
SAFETY-KLEEN CORPORATION	Contract Svc-Haz Waste Removal	701858	12/17/2025	3,511.74
CENTER FOR TRANSPORTATION AND THE	Membership & Subscriptions	701659	12/03/2025	3,500.00
ABSOLUTE SELF STORAGE	Storage Rental	701709	12/10/2025	3,456.00
VALLEY SANITARY DISTRICT	Permits & Licenses	701798	12/10/2025	3,394.70
CHARTER COMMUNICATIONS	Utilities	701788	12/10/2025	3,282.96
MITECH CONTROLS INC.	Inventory Repair Parts	701903	12/22/2025	3,245.92
PRUDENTIAL OVERALL SUPPLY	Uniforms	701779	12/10/2025	3,234.26
RUSH TRUCK CENTERS OF CALIFORNIA, INC.	Inventory Repair Parts	701781	12/10/2025	3,088.53
FORENSIC DRUG TESTING SERVICES	Alcohol & Drug Testing	701742	12/10/2025	3,013.00
AMAZON CAPITAL SERVICES, INC	Office Supplies	701874	12/22/2025	3,008.42
IMPERIAL IRRIGATION DIST	Utilities	701706	12/04/2025	3,000.00
COACH AND EQUIPMENT MFG CORP	Inventory Repair Parts	701662	12/03/2025	2,886.86
AMALGAMATED TRANSIT UNION	Travel Meetings/Seminars	701873	12/22/2025	2,832.92
FEDEX FREIGHT WEST, INC.	Shipping Service	701953	12/30/2025	2,742.62
GILLIG LLC	Inventory Repair Parts	701676	12/03/2025	2,729.70
DESIGN WEST ENGINEERING, INC.	WIP-Facility Improvement Projects- Project Acct#2607-01	701736	12/10/2025	2,696.00
MODEL1 COMMERCIAL VEHICLES, INC.	Inventory Repair Parts	701729	12/10/2025	2,570.05
SONSRAY FLEET SERVICES	Inventory Repair Parts	701921	12/22/2025	2,513.68
PALM SPRINGS MOTORS, INC.	Inventory Repair Parts	701689	12/03/2025	2,511.67
FRONTIER COMMUNICATIONS	Utilities	701828	12/17/2025	2,500.00
RONNIE HUERTA	Reimbursement Expense	701939	12/24/2025	2,494.04
KIRK'S AUTOMOTIVE, INC.	Inventory Repair Parts	701898	12/22/2025	2,482.34
CAROLYN C. GIGLIO	Reimbursement Expense	701934	12/24/2025	2,398.30
BURRTEC WASTE & RECYCLING SERVICES	Trash Service	701723	12/10/2025	2,356.49
PALM SPRINGS MOTORS, INC.	Inventory Repair Parts	701849	12/17/2025	2,344.18
IDWHOLESALE	ID Badge Supplies	701832	12/17/2025	2,338.15
C V WATER DISTRICT	Utilities	701948	12/30/2025	2,260.82
US BANK VOYAGER FLEET SYSTEMS	Unleaded Fuel	701796	12/10/2025	2,249.03
C V WATER DISTRICT	Utilities	701664	12/03/2025	2,220.07
VALLEY OFFICE EQUIPMENT, INC.	Copier Service	701867	12/17/2025	2,179.68
MAKAI SOLUTIONS	Equipment Repair-Shop Equipment	701760	12/10/2025	2,174.75
MAGALI JIMENEZ	SunLine Events Expense	701759	12/10/2025	2,160.28
QUICK FIX AUTO GLASS	Repair Parts-Fuel Cell	701649	12/03/2025	2,140.00
CAVENDISH HYDROGEN	Contract Services-General	701844	12/17/2025	2,095.00
JOSEPH LYNN FRIEND	Contracted Services	701755	12/10/2025	2,010.00
QUINCY COMPRESSOR LLC	Facility Maintenance	701880	12/22/2025	1,997.50
CAVENDISH HYDROGEN	Repair Parts-Hydrogen	701907	12/22/2025	1,970.00

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

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
WESTAIR GASES & EQUIPMENT, INC.	Materials & Supplies	701801	12/10/2025	1,904.48
QUICK FIX AUTO GLASS	Repair Parts-Fixed Route	701806	12/17/2025	1,850.00
SECTRAN SECURITY INC.	Bank Adjustment Fees	701783	12/10/2025	1,846.82
OMNITRACS, LLC	General Services	701966	12/30/2025	1,820.00
OMNITRACS, LLC	General Services	701771	12/10/2025	1,820.00
POSITIVE PROMOTIONS, INC.	Employee Recognition Expense	701778	12/10/2025	1,781.61
SECTRAN SECURITY INC.	Bank Adjustment Fees	701918	12/22/2025	1,779.76
CAROL DILLON	Reimbursement Expense	701933	12/24/2025	1,772.73
SWRCB ACCOUNTING OFFICE	Permits & Licenses	701789	12/10/2025	1,701.00
SEFAC USA, INC.	Equipment Repair-Shop Equipment	701859	12/17/2025	1,682.83
MERRIMAC PETROLEUM, INC	Freon & Coolant	701761	12/10/2025	1,661.72
NFI PARTS	Inventory Repair Parts	701871	12/22/2025	1,631.99
U.S. BANK INSTITUTIONAL TRUST-WESTERN	Pension Deposit	701977	12/30/2025	1,621.11
MICHAEL HOFACRE	Reimbursement Expense	701938	12/24/2025	1,618.77
BAE SYSTEMS CONTROLS, INC.	Inventory Repair Parts	701881	12/22/2025	1,614.58
ENTECH OIL INC	Lubricants- Oil	701888	12/22/2025	1,614.10
BURRTEC WASTE & RECYCLING SERVICES	Trash Service	701724	12/10/2025	1,604.81
PALM SPRINGS TAXI SERVICE, LLC	Taxi Voucher Program	701775	12/10/2025	1,600.45
DECALS BY DESIGN, INC.	Repair Parts-Fuel Cell	701733	12/10/2025	1,581.92
BROADLUX, INC.	Contract Services-General	701721	12/10/2025	1,576.00
JUAN PADILLA	Reimbursement Expense	701936	12/24/2025	1,565.40
EVERSOFT, INC.	Contract Services - General	701952	12/30/2025	1,530.84
PLAZA TOWING, INC.	Towing Services	701852	12/17/2025	1,525.00
FPS SPECIALISTS IN FIRE SYSTEMS	Facility Maintenance	701896	12/22/2025	1,520.00
MILE3 WEB DEVELOPMENT	Website Maintenance	701902	12/22/2025	1,470.00
MILE3 WEB DEVELOPMENT	Website Maintenance	701841	12/17/2025	1,470.00
WESTAIR GASES & EQUIPMENT, INC.	Repair Parts-Hydrogen	701929	12/22/2025	1,468.09
MINITUBISHI ELECTRIC US INC.	Facility Maintenance	701842	12/17/2025	1,450.00
CNTY OF RIVERSIDE DIV. OF WEIGHTS &	Permits & Licenses	701817	12/17/2025	1,446.00
OPW FUELING COMPONENTS	Inventory Repair Parts-SunFuels	701908	12/22/2025	1,436.00
LANGUAGELINE SOLUTIONS	Translation Services	701838	12/17/2025	1,397.78
DANIELS TIRE SERVICE INC.	Inventory Repair Parts	701669	12/03/2025	1,377.09
CMD CORPORATION	Inventory Repair Parts	701661	12/03/2025	1,355.32
GILLIG LLC	Inventory Repair Parts	701745	12/10/2025	1,318.87
COMPLETE COACH WORKS	Inventory Repair Parts	701665	12/03/2025	1,314.55
HOME DEPOT CREDIT SERVICES	Bus Stop Supplies	701753	12/10/2025	1,309.51
GENFARE, LLC	Repair Parts-Fixed Route	701954	12/30/2025	1,262.14
CDW GOVERNMENT, INC	Computer Supplies	701658	12/03/2025	1,226.95
HEPTAGON SEVEN CONSULTING, INC.	WIP-Security Fence Upgrade-Project Acct#2202-00	701752	12/10/2025	1,216.00

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

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
SMITTY'S AUTO PAINT OF HEMET	Shop Supplies	701697	12/03/2025	1,203.13
CINTAS CORPORATION NO.2	Emergency Preparedness Supplies	701885	12/22/2025	1,194.28
ON THE FLY TERMITE AND PEST CONTROL	Pest Control Services	701848	12/17/2025	1,192.00
ON THE FLY TERMITE AND PEST CONTROL	Pest Control Services	701967	12/30/2025	1,192.00
CAROL DILLON	SunLine Events Expense	701657	12/03/2025	1,117.76
JULIO AGUILERA	Reimbursement Expense	701959	12/30/2025	1,100.00
TOPS N BARRICADES, INC.	Bus Stop Supplies	701923	12/22/2025	1,064.66
OCTAVIO MENDOZA	Reimbursement Expense	701845	12/17/2025	1,055.46
CONNOISSEUR MEDIA HOLDCO, INC	Advertising	701819	12/17/2025	1,050.00
CONNOISSEUR MEDIA HOLDCO, INC	Advertising	701666	12/03/2025	1,050.00
SUN CHEMICAL	Shop Supplies	701855	12/17/2025	1,034.40
ODP BUSINESS SLOUTIONS LLC	Office Supplies	701846	12/17/2025	1,023.83
ROBERTSON AIR SYSTEMS	Facility Maintenance	701680	12/03/2025	1,013.50
QUADIENT FINANCE USA, INC.	Postage	701854	12/17/2025	1,000.00
Total Checks Over \$1,000	\$2,575,143.96			
Total Checks Under \$1,000	\$49,560.57			
Total Checks	\$2,624,704.53			



SunLine Transit Agency

Item 8B

February 25, 2026

Board Report

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Finance/Audit Committee/Committee of the Whole
Board of Directors

FROM: Luis Garcia, Chief Financial Officer

SUBJECT: Acceptance of Credit Card Statements for December 2025

Recommendation:

Recommend that the Board of Directors (Board) approve the credit card statements for December 2025.

Background:

The attached reports summarize the Agency's credit card expenses for December 2025. The reports summarize transactions for the credit cards which align with the statement closing dates of December 31, 2025.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

N/A

Approved/Reviewed by:

Luis Garcia, Chief Financial Officer

Attachments:

- Credit Card Statements for December 2025

SunLine Transit Agency Visa Credit Card Statement

Closing Date: 12/31/2025

Name on Card: Ray Stevens (Procurement Card)

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
1	11/26/26	12/1/2026	APTA	APTA Safety & Risk Management Seminar Bryan Valenzuela - Registration Fee		\$ 879.00
2	11/26/25	12/1/2026	APTA	APTA Safety & Risk Management Seminar John Sowers - Registration Fee		\$ 879.00
3	11/26/25	12/1/2026	APTA	APTA Safety & Risk Management Seminar Richard Powers - Registration Fee		\$ 879.00
4	11/28/26	12/1/2026	Successorie	2026 Employee Recognitions		\$ 2,350.84
5	11/28/26	12/1/2026	Terra Lago Club	Venue SunLine Holiday Party		\$ 3,839.00
6	12/02/26	12/2/2026	Microsoft	Microsoft 365 Business Pro Premium Licensing		\$ 4,334.71
7	12/02/26	12/3/2026	Panaderia Del Pueblo	Food for Holiday Breakfast		\$ 420.25
8	12/04/26	12/5/2026	Apple	iCloud Storage Upgrade for Israel Moreno		\$ 2.99
9	12/04/26	12/5/2026	WI Vue Testing Exam	Microsoft Azure Training for Israel Moreno		\$ 99.00
10	12/05/26	12/8/2026	Enrollease	Integration with EASE & ADP		\$ 504.25
11	12/08/26	12/9/2026	CTC-Vis	Clean Truck Check ARB Bus Fees		\$ 1,387.12
12	12/08/26	12/9/2026	National Safety Council	First Aid CPR AED License Renewal		\$ 80.00
13	12/08/26	12/9/2026	CTC-Vis	Clean Truck Check ARB Bus Processing Fee		\$ 41.47
14	12/08/26	12/9/2026	California Hydrogen Bus	CHBC & CHS Webinar Hydrogen Safety for Shawn Craycraft		\$ 95.00
15	12/09/26	12/10/2026	Sams Club	Holiday Breakfast Supplies		\$ 143.80
16	12/09/26	12/10/2026	Sams Club	Holiday Breakfast Supplies		\$ 435.32
17	12/09/26	12/10/2026	Sams Club	Holiday Breakfast Supplies		\$ 218.90
18	12/10/26	12/11/2026	Costco	Holiday Breakfast Supplies		\$ 119.90
19	12/10/26	12/11/2026	4 Imprint	ATLAS Branded Materials		\$ 2,764.60
20	12/10/26	12/12/2026	Cardenas Market	Holiday Breakfast Supplies		\$ 415.81
21	12/12/26	12/15/2026	Microsoft	Microsoft Visio Monthly License		\$ 15.75
22	12/12/26	12/15/2026	American Airlines	Think Transit Conference 2026 Sean Harrington - Flight Charge		\$ 267.19
23	12/12/26	12/15/2026	Think Transit	Think Transit Conference 2026 Sean Harrington - Registration Fee		\$ 1,275.00
24	12/12/26	12/15/2026	American Airlines	Think Transit Conference 2026 Sean Harrington - Flight Charge		\$ 44.73
25	12/12/26	12/15/2026	Southwest Airlines	Think Transit Conference 2026 Sean Harrington - Flight Charge		\$ 467.18

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
26	12/12/26	12/15/2026		Think Transit Conference 2026 Sean Harrington - Conversion Fee		\$ 12.75
27	12/15/26	12/17/2026	Elavon Srv Fee	PERB Arbitration Fee		\$ 1.15
28	12/15/26	12/17/2026	PERB ARB Full List	PERB Arbitration Fee		\$ 50.00
29	12/17/26	12/18/2026	Starlink	STARLINK Subscription Fee		\$ 165.00
30	12/17/26	12/19/2026	Battery Mart	Charger for Agency Golf Carts		\$ 857.65
31	12/18/26	12/19/2026	Automotive Software	CARB Inspection Software Renewal		\$ 1,232.29
32	12/19/26	12/22/2026	MagicJack	Phone Subscription for Coachella Hub		\$ 3.52
33	12/19/26	12/22/2026	MagicJack	Phone Subscription for Coachella Hub		\$ 50.50
34	12/20/26	12/22/2026	Terra Lago Club	Venue SunLine Holiday Party - Credit	\$ (500.00)	
35	12/22/26	12/22/2026	Apple	Microsoft Azure Training for Israel Moreno		\$ 24.99
36	12/24/26	12/26/2026	Soi Nexiq	Wabco ABS Software Subscription for Maintenance		\$ 400.00
Totals:					\$ (500.00)	\$ 24,757.66



Reporting Period : 11/29/2025 - 12/31/2025

Statement Summary

Name	Ray Stevens	Company	Sunline Transit Agency
Account #	XXXX-XXXX-XXXX-████	Currency	US Dollar
Reporting Period	11/29/2025 - 12/31/2025		

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
1 11/26/2025	12/1/2025	Apta 202-4964800, DC					879.00
		Purchase Apta	General Ledger Code: 5090100000				
		Approved Travel for Bryan Valenzuela – APTA Safety & Risk Management Seminar - Registration	GL 15-5090200000				
<hr/>							
2 11/26/2025	12/1/2025	Apta 202-4964800, DC					879.00
		Purchase Apta	General Ledger Code: 5090100000				
		Approved Travel for John Sowers – APTA Safety & Risk Management Seminar – Registration	GL 15-5090200000				
<hr/>							
3 11/26/2025	12/1/2025	Apta 202-4964800, DC					879.00
		Purchase Apta	General Ledger Code: 5090100000				
		Approved Travel for Richard Powers – APTA Safety & Risk Management Seminar – Registration	GL 15-5090200000				
<hr/>							
4 11/28/2025	12/1/2025	Successorie 800-535-2773, FL					2,350.84
		Purchase Successorie	General Ledger Code: 5099900002				
		PR 24051 - Successories - 2026 Employee Recognitions	GL 32-5090800100				
<hr/>							
5 11/28/2025	12/1/2025	Golf Club At Terra Lago 760-775-2000, CA					3,839.00
		Purchase Golf Club At Terra Lago	General Ledger Code: 5099900002				
		PR 23975 - Terra Lago Venue for our Christmas Party	GL 325090201000				

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
12	12/8/2025	12/9/2025	National Safety Council 800-621-7619, IL				80.00
	Purchase National Safety Council		General Ledger Code: 5090200001				
	PR 24144 - First Aid CPR AED License Renewal			GL 15-5090100000			
13	12/8/2025	12/9/2025	Ctc-Vis *svc 279-842-9957, MD				41.47
	Purchase Ctc-Vis *svc		General Ledger Code: 5099900002				
	PR 24163 - Clean Truck Check ARB bus fees			GL 22-5049900021			
14	12/8/2025	12/9/2025	California Hydrogen Bu Californiahyd, DC				95.00
	Purchase California Hydrogen Bu		General Ledger Code: 5090100000				
	PR 24191 - CHBC & CHS Webinar- Hydrogen Safety FOR Shawn Craycraft			GL 10-5090200000			
15	12/9/2025	12/10/2025	Samsclub #6609 Palm Desert, CA				143.80
	Purchase Samsclub #6609		General Ledger Code: 5099900002				
	PR 24170 - Holiday Breakfast Supplies			GL 32-5090201000			
16	12/9/2025	12/10/2025	Sams Club.Com 800-966-6546, AR				435.32
	Purchase Sams Club.Com		General Ledger Code: 5099900002				
	PR 24170 - Holiday Breakfast Supplies			GL 32-5090201000			
17	12/9/2025	12/10/2025	Samsclub #6609 Palm Desert, CA				218.90
	Purchase Samsclub #6609		General Ledger Code: 5099900002				
	PR 24170 - Holiday Breakfast Supplies			GL 32-5090201000			

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
18	12/10/2025	12/11/2025	Costco Whse #0441 Palm Desert, CA				119.90
	Purchase Costco Whse #0441		General Ledger Code: 5099900002				
	PR 24170 - Holiday Breakfast Supplies			GL 32-5090201000			
19	12/10/2025	12/11/2025	4imprint, Inc 4imprint.Com, WI				2,764.60
	Purchase 4imprint, Inc		General Ledger Code: 5099900002				
	PR 24206 - ATLAS Swag			GL 39-5090200001			
20	12/10/2025	12/12/2025	Cardenas Markets Indio, CA				415.81
	Purchase Cardenas Markets		General Ledger Code: 5099900002				
	PR 24170 - Holiday Breakfast Supplies			GL 32-5090201000			
21	12/12/2025	12/15/2025	Microsoft-G129658471 800-6427676, WA				15.75
	Purchase Microsoft-G129658471		General Ledger Code: 5030300011				
	PR 24283 - Microsoft Visio monthly license			GL 42-5030300011			
22	12/12/2025	12/15/2025	American Air Fort Worth, TX				267.19
	Purchase American Air		General Ledger Code: 5090200000				
	Approved Travel for Sean Harrington – ThinkTransit Conference 2026 - Flight Charge			GL 49-5090200000			
23	12/12/2025	12/15/2025	Thinktransit Mississauga, ON				1,275.00
	Purchase Thinktransit		General Ledger Code: 5039903800				
	Approved Travel for Sean Harrington – ThinkTransit Conference 2026 - Registration Fee			GL 49-5090200000			

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
24	12/12/2025	12/15/2025	American Air Fort Worth, TX				44.73
	Purchase American Air		General Ledger Code: 5090200000				
	Approved Travel for Sean Harrington – ThinkTransit Conference 2026 - Seat Charge			GL 49-5090200000			
25	12/12/2025	12/15/2025	Southwes Southwest.Com, TX				467.18
	Purchase Southwes		General Ledger Code: 5090200000				
	Approved Travel for Sean Harrington – ThinkTransit Conference 2026 - Flight Charge			GL 49-5090200000			
26	12/12/2025	12/15/2025					12.75
	Other Debits Currency Conversion Fee						
	Approved Travel for Sean Harrington – ThinkTransit Conference 2026 - Registratation Conversion Fee			GL 49-5090200000			
27	12/15/2025	12/17/2025	Elavon Srv Fee Arbitratio 678-7315974, GA				1.15
	Purchase Elavon Srv Fee Arbitratio		General Ledger Code: 5099900002				
	PR 24205 - PERB Arbitration R. Estrada			GL 32-5030300002			
28	12/15/2025	12/17/2025	Perb Arb Full List 916-3272275, CA				50.00
	Purchase Perb Arb Full List		General Ledger Code: 5099900002				
	PR 24205 - PERB Arbitration R. Estrada			GL 32-5030300002			
29	12/17/2025	12/18/2025	Starlink Internet 310-6829683, CA				165.00
	Purchase Starlink Internet		General Ledger Code: 5030300011				
	PR 23477 - Starlink Mini - Subscription Fee for Bryan Valenzuela			GL 15-5049900009			

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
30	12/17/2025	12/19/2025	Battery Mart 540-6650065, VA				857.65
	Purchase Battery Mart		General Ledger Code: 5099900002				
	PR24244 - Charger for Golf carts				GL 23-5040300200		
31	12/18/2025	12/19/2025	In *ra Automotive Softwar 248-7959971, MI				1,232.29
	Purchase In *ra Automotive Softwar		General Ledger Code: 5099900002				
	PR 24141 - CARB inspection spftware renewal				GL 22-5049900021		
32	12/19/2025	12/22/2025	Magicjack.Com 561-594-9925, FL				3.52
	Purchase Magicjack.Com		General Ledger Code: 5030200006				
	PR 24282 - Magicjack for Coachella phone system 911				GL 42-5030300011		
33	12/19/2025	12/22/2025	Magicjack.Com 561-594-9925, FL				50.50
	Purchase Magicjack.Com		General Ledger Code: 5030200006				
	PR 24282 - Magicjack for Coachella phone system 911				GL 42-5030300011		
34	12/20/2025	12/22/2025	Golf Club At Terra Lago 760-775-2000, CA				-500.00
	Credit Voucher Golf Club At Terra Lago		General Ledger Code: 5099900002				
	PR 23975 - Terra Lago Venue for our Christmas Party - Deposit Return				GL 325090201000		
35	12/22/2025	12/22/2025	Apple.Com/Bill 866-712-7753, CA				24.99
	Purchase Apple.Com/Bill		General Ledger Code: 5099900002				
	PR 24262 - Master Microsoft Azure Fund Exam Prep Udemy2025				GL 42-5030300011		

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
36 12/24/2025	12/26/2025	Soi Nexiq 800-639-6774, MI					400.00
Purchase Soi Nexiq			General Ledger Code: 5049900400				
24263 - Wabco ABS software subscription for Maintenance			GL 42-5030300011				

Transaction Count: 36

Total: 24,257.66

Employee Signature

Date

Authorized Approver Signature

Date

SunLine Transit Agency Visa Credit Card Statement

Closing Date: 12/31/2025

Name on Card: Mona Babauta

Trans. Date	Post Date	Reference	Detail - Description	Credits	Charges
1 12/9/2025	12/10/2025	Costco	Costco Gas For Company Vehicle; Mona Babauta, CEO/General Manager		\$39.29
Credits and Charges:				\$0.00	\$39.29



Reporting Period : 11/29/2025 - 12/31/2025

Statement Summary

Name	Mona Babauta	Company	Sunline Transit Agency
Account #	[REDACTED]	Currency	US Dollar
Reporting Period	11/29/2025 - 12/31/2025		

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
1 12/9/2025	12/10/2025	Costco Gas #0441 Palm Desert, CA					39.29
Purchase Costco Gas #0441			General Ledger Code: 5040102000				

Transaction Count: 1
Total: 39.29

Employee Signature **Date**

Authorized Approver Signature **Date**



SunLine Transit Agency

Item 8C

February 25, 2026

Board Report

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Finance/Audit Committee/Committee of the Whole
Board of Directors

FROM: Luis Garcia, Chief Financial Officer

SUBJECT: Acceptance of Monthly Budget Variance Report for December 2025

Recommendation:

Recommend that the Board of Directors (Board) approve the monthly budget variance report for December 2025.

Background:

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 1/12th of the annual budget. The FYTD budget values for the month of December 2026 are equal to 6/12^{ths} of the yearly budget.

Year to Date Summary

- As of December 31, 2025, the Agency's FYTD revenues are \$513,306 or 20.22% below the FYTD budget.
- As of December 31, 2025, the Agency's FYTD expenditures are \$3,497,317 or 13.85% above the FYTD budget.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

N/A

Approved/Reviewed by:

Luis Garcia, Chief Financial Officer

Attachments:

- Monthly Budget Variance Report for December 2025

SunLine Transit Agency
Budget Variance Report
December 2025

Description	FY26 Total Budget	Current Month			Fiscal Year to Date			
		Actual	Budget	Positive (Negative)	FYTD Actual	FY26 FYTD Budget	Positive (Negative)	Percentage Remaining
Operating Revenues:								
Passenger Revenue	1,974,505	151,959	164,542	(12,583)	923,538	987,253	(63,714)	53.2%
Other Revenue	3,101,551	166,178	258,463	(92,284)	1,101,184	1,550,775	(449,592)	64.5%
Total Operating Revenue	5,076,056	318,138	423,005	(104,867)	2,024,722	2,538,028	(513,306)	60.1%
Operating Expenses:								
Operator & Mechanic Salaries & Wages	11,907,530	968,600	992,294	23,694	5,753,234	5,953,765	200,531	51.7%
Operator & Mechanic Overtime	1,368,406	108,043	114,034	5,991	832,564	684,203	(148,361)	39.2%
Administration Salaries & Wages	7,997,750	712,127	666,479	(45,648)	4,138,848	3,998,875	(139,973)	48.2%
Administration Overtime	260,573	21,857	21,714	(142)	177,282	130,287	(46,996)	32.0%
Fringe Benefits	11,663,261	958,727	971,938	13,212	5,996,057	5,831,630	(164,426)	48.6%
Communications	295,000	32,968	24,583	(8,385)	182,721	147,500	(35,221)	38.1%
Legal Services	1,135,000	191,977	94,583	(97,393)	974,894	567,500	(407,394)	14.1%
Computer/Network Software Agreement	1,000,000	106,179	83,333	(22,846)	657,050	500,000	(157,050)	34.3%
Uniforms	115,598	2,918	9,633	6,715	41,223	57,799	16,576	64.3%
Contracted Services	1,860,415	130,440	155,035	24,594	789,393	930,208	140,815	57.6%
Equipment Repairs	31,500	0	2,625	2,625	11,632	15,750	4,118	63.1%
Security Services	150,000	12,349	12,500	151	78,803	75,000	(3,803)	47.5%
Fuel - CNG	1,290,000	124,847	107,500	(17,347)	715,466	645,000	(70,466)	44.5%
Fuel - Hydrogen	2,094,676	319,386	174,556	(144,829)	2,112,003	1,047,338	(1,064,665)	-0.8%
Tires	292,000	17,900	24,333	6,433	139,701	146,000	6,299	52.2%
Office Supplies	87,260	3,124	7,272	4,148	26,051	43,630	17,579	70.1%
Travel/Training	323,345	9,771	26,945	17,175	128,913	161,673	32,759	60.1%
Repair Parts	1,692,631	101,935	141,053	39,118	1,072,239	846,316	(225,923)	36.7%
Facility Maintenance	72,500	3,808	6,042	2,234	32,977	36,250	3,273	54.5%
Electricity - CNG & Hydrogen	652,000	42,472	54,333	11,861	336,224	326,000	(10,224)	48.4%
Natural Gas	1,483,750	92,430	123,646	31,216	526,308	741,875	215,567	64.5%
Water and Gas	16,000	887	1,333	446	5,142	8,000	2,858	67.9%
Insurance Losses	1,578,415	201,767	131,535	(70,233)	1,230,085	789,207	(440,878)	22.1%
Insurance Premium - Property	235,000	19,563	19,583	20	117,378	117,500	122	50.1%
Repair Claims	15,000	21,164.38	1,250	(19,914)	33,510.62	7,500	(26,011)	-123.4%
Fuel Taxes	103,500	5,760	8,625	2,865	38,080	51,750	13,670	63.2%
Other Expenses	6,816,945	578,006	568,079	(9,927)	3,606,205	3,408,473	(197,733)	47.1%
Self Consumed Fuel	(4,038,056)	(163,590)	(336,505)	(172,915)	(1,006,670)	(2,019,028)	(1,012,358)	75.1%
Total Operating Expenses (Before Depreciation)	50,500,000	4,625,415	4,208,333	(417,082)	28,747,317	25,250,000	(3,497,317)	43.1%
Operating Expenses in Excess of Operating Revenue		\$ (4,307,278)			\$ (26,722,594)			
Subsidies:								
Local	7,000,000	663,768	583,333	(80,434)	4,118,052	3,500,000	(618,052)	41.2%
State	32,523,821	3,084,037	2,710,318	(373,719)	19,133,541	16,261,911	(2,871,630)	41.2%
Federal	5,900,123	559,473	491,677	(67,796)	3,471,002	2,950,062	(520,940)	41.2%
Total Subsidies	45,423,944	4,307,278	3,785,329	(521,949)	26,722,594	22,711,972	(4,010,622)	41.2%
Net Operating Gain (Loss) After Subsidies	\$ (0)	\$ -			\$ -			

SunLine Transit Agency
Budget Variance Report
December 2025

Description	FY26 Total Budget	Current Month			Fiscal Year to Date			
		Actual	Budget	Positive (Negative)	FYTD Actual	FY26 FYTD Budget	Positive (Negative)	Percentage Remaining
Operating Expenses:								
Wages & Benefits	33,197,521	2,769,353	2,766,460	(2,893)	16,897,985	16,598,760	(299,225)	49.1%
Services	7,126,058	722,981	593,838	(129,143)	4,325,996	3,563,029	(762,967)	39.3%
Fuels & Lubricants	3,515,476	453,242	292,956	(160,286)	2,870,159	1,757,738	(1,112,421)	18.4%
Tires	292,000	17,900	24,333	6,433	139,701	146,000	6,299	52.2%
Materials and Supplies	2,331,591	136,028	194,299	58,272	1,305,429	1,165,796	(139,633)	44.0%
Utilities	2,573,750	163,846	214,479	50,633	1,053,085	1,286,875	233,790	59.1%
Casualty & Liability	4,333,415	462,138	361,118	(101,020)	2,702,917	2,166,707	(536,210)	37.6%
Taxes and Fees	103,500	5,760	8,625	2,865	38,080	51,750	13,670	63.2%
Miscellaneous Expenses	1,064,745	57,757	88,729	30,972	420,633	532,373	111,740	60.5%
Self Consumed Fuel	(4,038,056)	(163,590)	(336,505)	(172,915)	(1,006,670)	(2,019,028)	(1,012,358)	75.1%
Total Operating Expenses (Before Depreciation)	50,500,000	4,625,415	4,208,333	(417,082)	28,747,317	25,250,000	(3,497,317)	43.1%
Revenues:								
Passenger Revenue	1,974,505	151,959	164,542	(12,583)	923,538	987,253	(63,714)	53.2%
Other Revenue	3,101,551	166,178	258,463	(92,284)	1,101,184	1,550,775	(449,592)	64.5%
Total Operating Revenue	5,076,056	318,138	423,005	(104,867)	2,024,722	2,538,028	(513,306)	60.1%
Net Operating Gain (Loss)		\$ (4,307,278)			\$ (26,722,594)			
Subsidies:								
Local	7,000,000	663,768	583,333	(80,434)	4,118,052	3,500,000	(618,052)	41.2%
State	32,523,821	3,084,037	2,710,318	(373,719)	19,133,541	16,261,911	(2,871,630)	41.2%
Federal	5,900,123	559,473	491,677	(67,796)	3,471,002	2,950,062	(520,940)	41.2%
Total Subsidies	45,423,944	4,307,278	3,785,329	(521,949)	26,722,594	22,711,972	(4,010,622)	41.2%
Net Operating Gain (Loss) After Subsidies	\$ (0)	\$ -			\$ -			

Budget Variance Analysis - SunLine Transit Agency

Passenger Revenue

- Passenger fare revenues are below budgetary figures due to a decrease in ridership compared to FY25.
- As of December, ridership was at 3.2% below FY25 FYTD totals.
- Total system ridership was 45,358 trips below FY25 FYTD amounts.

Ridership

	FY25-December	FY26-December	Variance	%Δ
Fixed Route	230,155	216,224	(13,931)	-6.1%
Paratransit	8,703	7,952	(751)	-8.6%
SunRide	1,950	1,928	(22)	-1.1%
System Total	240,808	226,104	(14,704)	-6.1%

Ridership

	FYTD-FY25	FYTD-FY26	Variance	%Δ
Fixed Route	1,333,763	1,295,121	(38,642)	-2.9%
Paratransit	55,795	50,891	(4,904)	-8.8%
SunRide	12,685	10,873	(1,812)	-14.3%
System Total	1,402,243	1,356,885	(45,358)	-3.2%

Other Revenue

- The unfavorable variance in other revenue is primarily due to a decrease in outside CNG fueling revenue and 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

- Administrative salary and wage expenses are within an acceptable range of the budget.

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

- The unfavorable balance in fringe benefit expenses is primarily attributed to increases in benefit utilization.

Communications

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

Legal Services

- The unfavorable variance in legal services is primarily due to greater utilization of legal services.

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 below the budgeted amount due to less utilization of uniform allowance and vacant positions.

Contracted Services

- Savings in contract services costs are primarily attributed to budgeted operating and maintenance costs for the hydrogen electrolyzer station that have not been incurred

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

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

Fuel - Hydrogen

- The unfavorable balance is due to a increase utilization of liquid hydrogen.

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 unfavorable variance is primarily due to repairs related to fueling equipment and fixed route buses.

Facility Maintenance

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

Electricity - CNG & Hydrogen

- Electricity - CNG & Hydrogen expenses are within an acceptable range of the budget.

Natural Gas

- The positive variance is primarily attributed to lower usage of CNG fixed route vehicles over budgeted estimates for FY26.

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

- Insurance premium expenses are within an acceptable range of the budget.

Repair Claims

- The unfavorable variance is primarily attributed due to the replacement of a bus stop shelter replaced after a vehicle collision.

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.



Board Report

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Finance/Audit Committee/Committee of the Whole Board of Directors

FROM: Luis Garcia, Chief Financial Officer

SUBJECT: Acceptance of Contracts Signed Between \$25,000 and \$250,000 for December 2025

Recommendation:

Recommend that the Board of Directors (Board) approve contracts signed between \$25,000 and \$250,000 for December 2025.

Background:

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) agreement, four (4) purchase orders and one (1) change order executed in December 2025 between \$25,000 and \$250,000:

December 2025

Vendor	Purpose	Amount
Euna Solutions	Online Procurement	\$69,200.00
Desert Business Interiors	Seating Replacements	\$69,735.87
CPAC, Inc	Laptop Computers	\$27,580.45

Connoisseur Media	Digital Marketing	\$40,000.00
Complete Coach Works	Bus #627 Repair	\$62,313.62
Cora Constructors	Back Up Generator	\$31,445.08

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

N/A

Approved/Reviewed by:

Luis Garcia, Chief Financial Officer

Attachments:

- Contracts Signed Between \$25,000 and \$250,000 for December 2025

Contracts Signed Between \$25,000 and \$250,000
December 2025

Vendor	Product/Service	Need	Budgeted	Budgeted Amount	Cost	Type
Euna Solutions	Online Procurement Platform	Solicitations and Contracts Platform	FY26 - FY31	\$70,000.00	\$69,200.00	Agreement
Desert Business Interiors	New Chairs	Workplace Seating Replacement	FY26	\$55,116.00	\$55,116.00	Purchase Order
CPAC, Inc	Computers	Laptops	FY26	\$69,735.87	\$69,735.87	Purchase Order
Connoisseur Media	Digital Media	Marketing	FY26	\$40,000.00	\$40,000.00	Purchase Order
Complete Coach Works	Bus Repair	Repair Bus #627	FY26	\$62,313.62	\$62,313.62	Purchase Order
Cora Constructors	Backup Generator	5 Technical Changes	FY26	\$31,445.08	\$31,445.08	Change Order



Board Report

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Finance/Audit Committee/Committee of the Whole Board of Directors

FROM: Luis Garcia, Chief Financial Officer

SUBJECT: Acceptance of Union & Non-Union Pension Investment Asset Summary for December 2025

Recommendation:

Recommend that the Board of Directors (Board) approve union & non-union pension investment asset summary for December 2025.

Background:

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

Union

Asset Class		Actual	Range
Growth Assets			
	Domestic Equity	29.5%	16% – 56%
	International Equity	19.0%	0% - 39%
	Other	8.0%	0% – 20%
Income Assets			
	Fixed Income	38.3%	25% - 65%
	Other	4.2%	0% – 20%
Real Return Assets		0.0%	0% – 20%
Cash Equivalents		1.0%	0% – 20%

Non-Union

Asset Class		Actual	Range
Growth Assets			
	Domestic Equity	29.5%	16% - 56%
	International Equity	19.0%	0% - 39%
	Other	8.0%	0% - 20%
Income Assets			
	Fixed Income	38.1%	25% - 65%
	Other	4.2%	0% - 20%
Real Return Assets		0.0%	0% - 20%
Cash Equivalents		1.2%	0% - 20%

Components may not sum to 100.0% due to rounding.

For the month of December, the market value of assets increased by \$194,842 and \$235,035 for the union and non-union plans, respectively.

Month to Month Asset Comparison

Month	Market Value - Union	Market Value - Non-Union
November 2025	\$48,303,572	\$48,589,077
December 2025	\$48,498,414	\$48,824,112
Increase (Decrease)	\$194,842	\$235,035

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management be effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

N/A

Approved/Reviewed by:

Luis Garcia, Chief Financial Officer

Attachments:

- Union & Non-Union Pension Investment Asset Summary for December 2025

Detail of Securities Held & Market Analytics

For the Month Ending December 31, 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
Exchange-Traded Fund - Bond									
ISHARES CORE U.S. AGGREGATE	464287226	8278395	7,165.00	97.84	701,023.60	99.88	715,640.20	14,616.60	1.48
ISHARES CORE U.S. AGGREGATE	464287226	8278395	7,159.00	97.77	699,934.71	99.88	715,040.92	15,106.21	1.47
ISHARES CORE U.S. AGGREGATE	464287226	8278395	4,049.00	98.87	400,324.63	99.88	404,414.12	4,089.49	0.83
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,307.00	96.40	318,794.80	99.88	330,303.16	11,508.36	0.68
ISHARES CORE U.S. AGGREGATE	464287226	8278395	6,446.00	92.76	597,930.32	99.88	643,826.48	45,896.16	1.33
ISHARES CORE U.S. AGGREGATE	464287226	8278395	16,903.00	98.64	1,667,311.92	99.88	1,688,271.64	20,959.72	3.48
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,322.00	99.12	329,276.64	99.88	331,801.36	2,524.72	0.68
Security Type Sub-Total			48,351.00		4,714,596.62	699.16	4,829,297.88	114,701.26	9.95
Exchange-Traded Fund - Equity									
SCHWAB US LARGE-CAP ETF	808524201	17333747	466,004.00	22.54	10,505,283.51	26.91	12,540,167.64	2,034,884.13	25.86
SCHWAB US LARGE-CAP ETF	808524201	17333747	39,046.00	22.81	890,639.26	26.91	1,050,727.86	160,088.60	2.17
Security Type Sub-Total			505,050.00		11,395,922.77	53.82	13,590,895.50	2,194,972.73	28.03
Money Market Mutual Fund									
FIRST AM GOVT OBLIG-Z DTD 01/01/2010 0.000% --	31846V567	351477	501,663.56	1.00	501,663.56	100.00	501,663.56	0.00	1.03
Security Type Sub-Total			501,663.56		501,663.56	100.00	501,663.56	0.00	1.03
Mutual Fund - Bond									
BAIRD CORE PLUS BOND-INST	057071870	7001692	509,720.56	10.76	5,482,487.38	10.31	5,255,218.95	(227,268.43)	10.84
BBH LIMITED DURATION-I	05528X851	7344118	0.03	10.29	0.35	10.51	0.36	0.01	0.00
NUVEEN CORE BOND FUND-R6	87244W607	7580345	332,353.47	9.15	3,041,803.72	9.28	3,084,240.18	42,436.46	6.36
PGIM TOTAL RETURN BOND-R6	74440B884	168981	295,486.06	12.94	3,822,988.54	12.18	3,599,020.23	(223,968.31)	7.42
VOYA INTERMEDIATE BOND-R6	92913L569	IIBZX	207,011.40	9.57	1,980,290.46	8.77	1,815,489.98	(164,800.48)	3.74
Security Type Sub-Total			1,344,571.53		14,327,570.45	51.05	13,753,969.70	(573,600.75)	28.36
Mutual Fund - Equity									
COLUMBIA SMALL CAP GRW-INST3	19765Y340	195897	10,086.14	28.40	286,433.26	34.46	347,568.48	61,135.22	0.72

Detail of Securities Held & Market Analytics

For the Month Ending **December 31, 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
Mutual Fund - Equity										
FIDELITY EMRG MRKT INDX		316146331	26545809	103,712.20	11.50	1,193,179.38	13.68	1,418,782.90	225,603.52	2.93
FIDELITY INTL INDX		315911727	308475	53,484.36	56.23	3,007,381.42	60.80	3,251,849.01	244,467.59	6.71
GLDMN SCHS GQG PRT INTL-R6		38147N269	GSIX	43,929.40	19.83	870,974.41	22.46	986,654.29	115,679.88	2.03
HRDNG LVNR INTL EQTY-INST		412295107	175052	0.00	25.00	0.02	27.16	0.02	0.00	0.00
JANUS HNDRSN OVERSEAS-N		47103D835	JANUS	26,607.72	51.08	1,359,065.32	57.11	1,519,566.63	160,501.31	3.13
MFS INTL DIVERSIFICAT-R6		552743544	9214518	73,060.56	26.33	1,923,620.14	27.78	2,029,622.30	106,002.16	4.18
PIMCO RAE US SMALL-INST		72202L421	45833025	30,337.40	12.02	364,739.33	11.63	352,823.93	(11,915.40)	0.73
Security Type Sub-Total				341,217.77		9,005,393.28	255.08	9,906,867.56	901,474.28	20.43
Separate Account										
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	45,325.00	1.00	45,325.00	120.15	54,459.14	9,134.14	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	49,000.00	1.00	49,000.00	120.15	58,874.74	9,874.74	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	45,325.00	1.00	45,325.00	120.15	54,459.14	9,134.14	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	45,325.00	1.00	45,325.00	120.15	54,459.14	9,134.14	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	29,588.71	1.00	29,588.71	120.15	35,551.58	5,962.87	0.07
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	49,000.00	1.00	49,000.00	120.15	58,874.74	9,874.74	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	45,325.00	1.00	45,325.00	120.15	54,459.14	9,134.14	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	45,325.00	1.00	45,325.00	120.15	54,459.14	9,134.14	0.11
BLACKSTONE INFRASTRUCTURE DTD 10/01/2024 0.000% --		BKSTONE63	SA495	900,000.00	1.00	900,000.00	117.43	1,056,834.00	156,834.00	2.19
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --		GOLUB0090	F_GOLUB	1,031,505.00	1.00	1,031,505.00	133.72	1,379,307.64	347,802.64	2.84

Detail of Securities Held & Market Analytics

For the Month Ending **December 31, 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
Separate Account									
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0090	F_GOLUB	180,000.00	1.00	180,000.00	133.72	240,692.36	60,692.36	0.50
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	91,315.75	1.00	91,315.75	143.16	130,729.02	39,413.27	0.27
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	252,000.00	1.00	252,000.00	143.16	360,767.05	108,767.05	0.74
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	127,930.57	1.00	127,930.57	143.16	183,147.36	55,216.79	0.38
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	130,837.59	1.00	130,837.59	143.16	187,309.09	56,471.50	0.39
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	309,750.00	1.00	309,750.00	143.16	443,442.83	133,692.83	0.91
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	173,360.99	1.00	173,360.99	143.16	248,186.24	74,825.25	0.51
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	204,378.01	1.00	204,378.01	143.16	292,590.68	88,212.67	0.60
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	58,570.33	1.00	58,570.33	143.16	83,850.18	25,279.85	0.17
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	73,423.62	1.00	73,423.62	143.16	105,114.38	31,690.76	0.22
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	105,000.00	1.00	105,000.00	143.16	150,319.60	45,319.60	0.31
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	30,795.20	1.00	30,795.20	143.16	44,086.88	13,291.68	0.09
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	80,433.93	1.00	80,433.93	143.16	115,150.44	34,716.51	0.24
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	147,000.00	1.00	147,000.00	143.16	210,447.44	63,447.44	0.43
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	180,319.43	1.00	180,319.43	143.16	258,148.05	77,828.62	0.53
Security Type Sub-Total			4,430,834.13		4,430,834.13	3,350.34	5,915,720.00	1,484,885.87	12.18

Detail of Securities Held & Market Analytics

For the Month Ending **December 31, 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	
Managed Account Sub-Total			7,171,687.99		44,375,980.81	4,509.45	48,498,414.20	4,122,433.39	99.98	
Securities Sub-Total			\$7,171,687.99		\$44,375,980.81	\$4,509.45	\$48,498,414.20	\$4,122,433.39	99.98%	
Accrued Interest							\$0.00			
Total Investments							\$48,498,414.20			

Detail of Securities Held & Market Analytics

For the Month Ending December 31, 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
Exchange-Traded Fund - Bond									
ISHARES CORE U.S. AGGREGATE	464287226	8278395	7,146.00	97.84	699,164.64	99.88	713,742.48	14,577.84	1.46
ISHARES CORE U.S. AGGREGATE	464287226	8278395	6,136.00	97.77	599,916.11	99.88	612,863.68	12,947.57	1.26
ISHARES CORE U.S. AGGREGATE	464287226	8278395	4,049.00	98.87	400,324.63	99.88	404,414.12	4,089.49	0.83
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,317.00	96.40	319,758.80	99.88	331,301.96	11,543.16	0.68
ISHARES CORE U.S. AGGREGATE	464287226	8278395	17,290.00	98.64	1,705,485.60	99.88	1,726,925.20	21,439.60	3.54
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,372.00	99.12	334,232.64	99.88	336,795.36	2,562.72	0.69
ISHARES CORE U.S. AGGREGATE	464287226	8278395	6,272.00	92.76	581,790.09	99.88	626,447.36	44,657.27	1.28
Security Type Sub-Total			47,582.00		4,640,672.51	699.16	4,752,490.16	111,817.65	9.74
Exchange-Traded Fund - Equity									
SCHWAB US LARGE-CAP ETF	808524201	17333747	43,384.00	22.81	989,589.04	26.91	1,167,463.44	177,874.40	2.39
SCHWAB US LARGE-CAP ETF	808524201	17333747	464,498.00	22.54	10,471,333.25	26.91	12,499,641.18	2,028,307.93	25.60
Security Type Sub-Total			507,882.00		11,460,922.29	53.82	13,667,104.62	2,206,182.33	27.99
Money Market Mutual Fund									
FIRST AM GOVT OBLIG-Z DTD 01/01/2010 0.000% --	31846V567	351477	632,057.32	1.00	632,057.32	100.00	632,057.32	0.00	1.29
Security Type Sub-Total			632,057.32		632,057.32	100.00	632,057.32	0.00	1.29
Mutual Fund - Bond									
BAIRD CORE PLUS BOND-INST	057071870	7001692	513,263.91	10.73	5,506,404.81	10.31	5,291,750.85	(214,653.96)	10.84
BBH LIMITED DURATION-I	05528X851	7344118	0.03	10.29	0.35	10.51	0.36	0.01	0.00
NUVEEN CORE BOND FUND-R6	87244W607	7580345	332,353.47	9.15	3,041,803.72	9.28	3,084,240.18	42,436.46	6.32
PGIM TOTAL RETURN BOND-R6	74440B884	168981	299,383.55	12.91	3,866,443.36	12.18	3,646,491.60	(219,951.76)	7.47
VOYA INTERMEDIATE BOND-R6	92913L569	IIBZX	208,459.24	9.57	1,995,786.60	8.77	1,828,187.56	(167,599.04)	3.74
Security Type Sub-Total			1,353,460.20		14,410,438.84	51.05	13,850,670.55	(559,768.29)	28.37
Mutual Fund - Equity									
COLUMBIA SMALL CAP GRW-INST3	19765Y340	195897	9,981.66	28.40	283,466.14	34.46	343,968.07	60,501.93	0.70

Detail of Securities Held & Market Analytics

For the Month Ending **December 31, 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
Mutual Fund - Equity										
FIDELITY EMRG MRKT INDX		316146331	26545809	104,334.17	11.50	1,200,334.94	13.68	1,427,291.42	226,956.48	2.92
FIDELITY INTL INDX		315911727	308475	53,783.15	56.23	3,024,176.56	60.80	3,270,015.41	245,838.85	6.70
GLDMN SCHS GQG PRT INTL-R6		38147N269	GSIX	44,191.90	19.85	877,066.00	22.46	992,550.15	115,484.15	2.03
HRTFRD SCHR EM MRKT EQ-SDR		41665H789	10575468	0.00	20.00	0.02	22.98	0.02	0.00	0.00
JANUS HNDRSN OVERSEAS-N		47103D835	JANUS	26,755.56	51.08	1,366,612.70	57.11	1,528,009.85	161,397.15	3.13
MFS INTL DIVERSIFICAT-R6		552743544	9214518	73,470.40	26.33	1,934,399.24	27.78	2,041,007.64	106,608.40	4.18
PIMCO RAE US SMALL-INST		72202L421	45833025	34,671.31	12.02	416,844.95	11.63	403,227.35	(13,617.60)	0.83
Security Type Sub-Total				347,188.15		9,102,900.55	250.90	10,006,069.91	903,169.36	20.49
Separate Account										
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	45,325.00	1.00	45,325.00	120.15	54,459.12	9,134.12	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	49,000.00	1.00	49,000.00	120.15	58,874.73	9,874.73	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	49,000.00	1.00	49,000.00	120.15	58,874.73	9,874.73	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	45,325.00	1.00	45,325.00	120.15	54,459.12	9,134.12	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	45,325.00	1.00	45,325.00	120.15	54,459.12	9,134.12	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	29,588.71	1.00	29,588.71	120.15	35,551.57	5,962.86	0.07
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	45,325.00	1.00	45,325.00	120.15	54,459.12	9,134.12	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	45,325.00	1.00	45,325.00	120.15	54,459.12	9,134.12	0.11
BLACKSTONE INFRASTRUCTURE DTD 10/01/2024 0.000% --		BKSTONE64	SA496	900,000.00	1.00	900,000.00	117.43	1,056,834.00	156,834.00	2.16
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --		GOLUB0091	F_GOLUB	180,000.00	1.00	180,000.00	133.72	240,692.36	60,692.36	0.49

Detail of Securities Held & Market Analytics

For the Month Ending **December 31, 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	
Separate Account										
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0091	F_GOLUB	1,031,505.00	1.00	1,031,505.00	133.72	1,379,307.64	347,802.64	2.83	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	105,000.00	1.00	105,000.00	143.16	150,319.60	45,319.60	0.31	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	80,433.93	1.00	80,433.93	143.16	115,150.44	34,716.51	0.24	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	173,360.99	1.00	173,360.99	143.16	248,186.24	74,825.25	0.51	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	58,570.33	1.00	58,570.33	143.16	83,850.18	25,279.85	0.17	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	30,795.20	1.00	30,795.20	143.16	44,086.88	13,291.68	0.09	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	73,423.62	1.00	73,423.62	143.16	105,114.38	31,690.76	0.22	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	127,930.57	1.00	127,930.57	143.16	183,147.36	55,216.79	0.38	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	309,750.00	1.00	309,750.00	143.16	443,442.83	133,692.83	0.91	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	130,837.59	1.00	130,837.59	143.16	187,309.09	56,471.50	0.38	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	252,000.00	1.00	252,000.00	143.16	360,767.05	108,767.05	0.74	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	180,319.43	1.00	180,319.43	143.16	258,148.05	77,828.62	0.53	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	204,378.01	1.00	204,378.01	143.16	292,590.68	88,212.67	0.60	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	91,315.75	1.00	91,315.75	143.16	130,729.02	39,413.27	0.27	
NB Secondary Opps Offshore V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	147,000.00	1.00	147,000.00	143.16	210,447.44	63,447.44	0.43	
Security Type Sub-Total			4,430,834.13		4,430,834.13	3,350.34	5,915,719.87	1,484,885.74	12.12	

Detail of Securities Held & Market Analytics

For the Month Ending **December 31, 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	
Managed Account Sub-Total			7,319,003.80		44,677,825.64	4,505.27	48,824,112.43	4,146,286.79	100.00	
Securities Sub-Total			\$7,319,003.80		\$44,677,825.64	\$4,505.27	\$48,824,112.43	\$4,146,286.79	100.00%	
Accrued Interest							\$0.00			
Total Investments							\$48,824,112.43			



Board Report

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Finance/Audit Committee/Committee of the Whole Board of Directors

FROM: Daren Tatham, Assistant Transit Planner

SUBJECT: Acceptance of Ridership Report for December 2025

Recommendation:

Recommend that the Board of Directors (Board) approve the Ridership Report for December 2025.

Background:

	Monthly Ridership		Monthly Variance	
	Dec-25	Dec-24	Net	Percent
Fixed Route	216,224	231,155	(13,931)	(6.1%)
SunRide	1,928	1,950	(22)	(1.1%)
Taxi Voucher*	144	118	26	22.0%
SunDial	7,952	8,703	(751)	(8.6%)
Total	226,248	256,191	(14,678)	(6.1%)

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

Yearly Ridership	
Fiscal Year 2026	1,357,756
Fiscal Year 2025	1,403,149
Ridership Increase	(45,393)

Fiscal year to date system ridership decreased by 45,393 rides or 3.24% 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.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

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.

In Collaboration with:

Anthony R. Parham Sr., Paratransit Operations Manager
Jill Plaza, Taxi/Contracted Transportation Services Administrator

Approved/Reviewed by:

David Legaretta, Financial Analyst

Attachments:

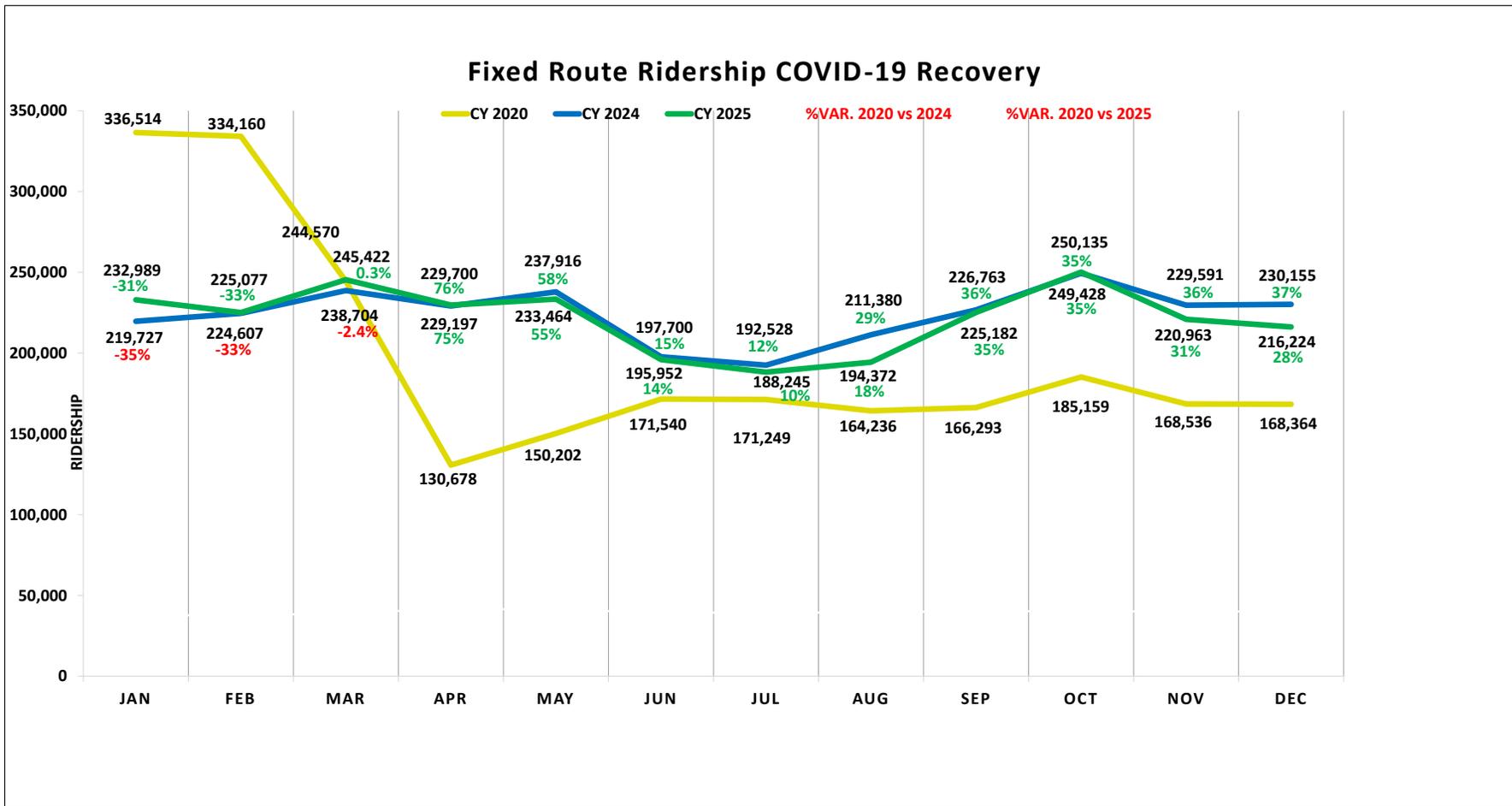
- Specialized Ridership Reports – December 2025
- Ridership COVID-19 Recovery – December 2025
- Monthly Ridership Report FY 2025-2026 December 2025



SunLine Transit Agency Monthly Ridership Report December 2025

Fixed Route		FY 2026		FY 2025		Monthly KPI		Bikes		Wheelchairs	
		Dec 2025	Dec 2024	YTD	YTD	Passengers/ Rev. Hours	Passengers/ Rev. Miles	Monthly	FYTD	Monthly	FYTD
Route 1EV	Coachella - Hwy 111 - Palm Desert Mall	44,911	49,718	259,148	295,037	17.8	1.5	1,881	10,203	303	1,584
Route 1WV	Palm Springs - Hwy 111 - Palm Desert Mall	37,872	40,181	235,027	228,320	16.0	1.3	1,187	7,995	278	1,589
Route 2	Desert Hot Springs - Palm Springs - Cathedral City	58,748	66,204	366,517	389,390	17.8	1.3	1,896	9,191	631	2,677
Route 3	Desert Hot Springs - Desert Edge	7,470	8,066	45,397	47,453	9.8	0.6	178	1,430	53	417
Route 4	Westfield Palm Desert - Palm Springs	20,192	20,414	121,166	117,419	11.5	0.8	489	2,758	106	642
Route 5	Desert Hot Springs - CSUSB - Palm Desert	3,355	2,386	18,114	15,205	6.6	0.3	108	718	22	130
Route 6	Coachella - Fred Waring - Westfield Palm Desert	5,189	4,217	30,637	25,734	9.9	0.7	213	1,192	27	181
Route 7	Bermuda Dunes - Indian Wells - La Quinta	7,705	8,479	43,752	43,970	9.3	0.7	302	2,021	34	198
Route 8	North Indio - Coachella -Thermal/Mecca	15,303	16,767	88,595	96,375	9.8	0.7	520	2,564	100	594
Route 9	North Shore - Mecca - Oasis	4,919	4,770	26,556	24,278	7.7	0.4	49	448	15	163
Route 10	Indio - CSUSB - San Bernardino - Metrolink	2,576	2,450	18,766	19,082	21.1	0.2	40	2,055	14	325
Route 200 SB	Palm Springs High School AM Tripper	178	125	826	947	13.3	0.8	2	4	-	1
Route 500 SB	Westfield Palm Desert PM Tripper	42	18	270	751	3.3	0.5	-	10	-	1
Route 700 SB/NB	Harris / Washington - Calle Madrid / Ave Vallejo AM Tripper	308	150	1,783	1,218	18.1	1.1	2	4	-	-
Route 701 SB/NB	Harris / Washington - Calle Madrid / Ave Vallejo PM Tripper	613	604	3,269	4,181	41.0	2.9	-	7	-	1
Route 800 NB	Shadow Hills High School AM Tripper	6,843	5,606	35,298	24,404	121.7	6.1	3	59	6	13
	Fixed Route Total	216,224	230,155	1,295,121	1,333,763			6,870	40,659	1,589	8,516
	SunRide	1,928	1,950	10,873	12,685						
	Taxi Voucher	144	118	871	906						
	SunDial	7,952	8,703	50,891	55,795						
	System Total	226,248	240,926	1,357,756	1,403,149						
		Dec-25	Dec-24								
	Weekdays:	23	22								
	Saturdays:	4	4								
	Sundays:	4	5								
	Total Days:	31	31								

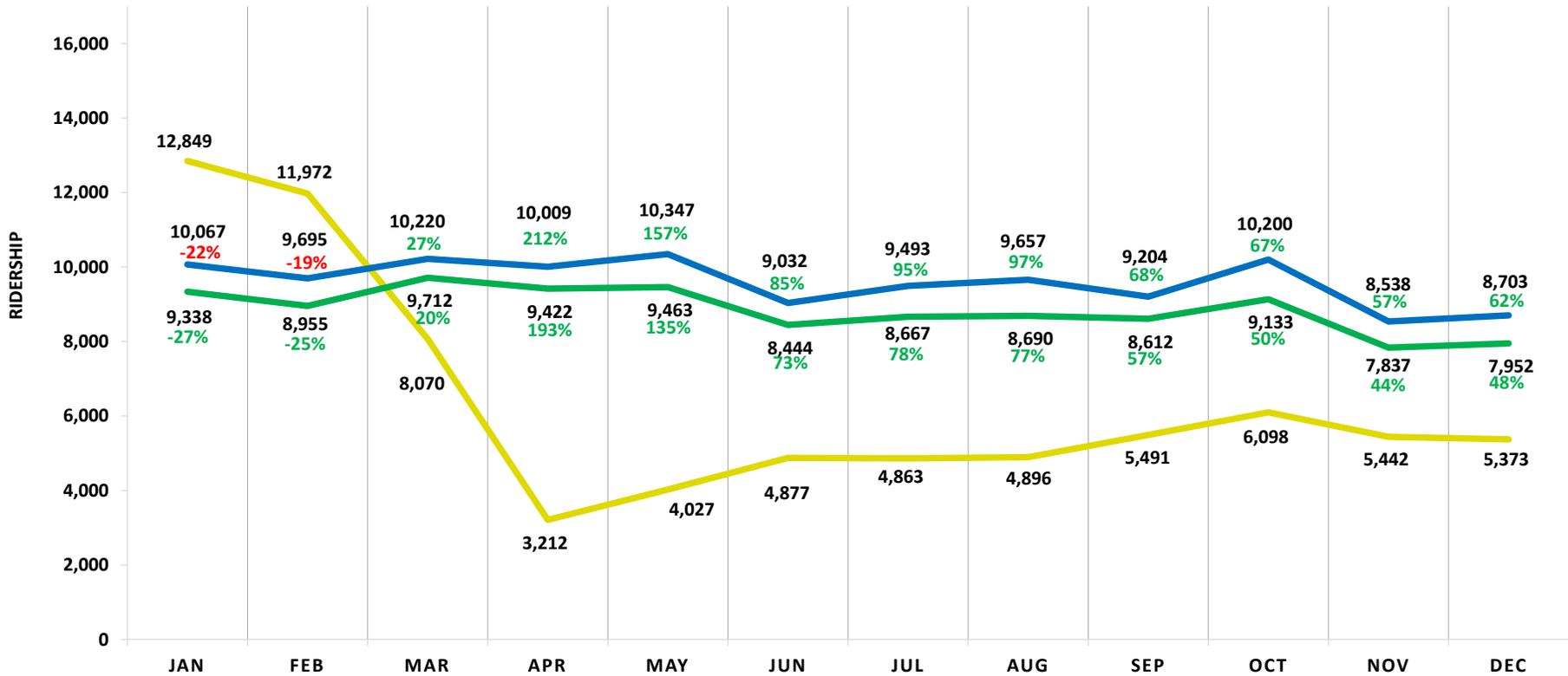
Mobile Ticketing contributed with 42,054 rides, the total for December 2025 includes 57 paratransit mobile tickets.



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

Item 8G

February 25, 2026

Board Report

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Finance/Audit Committee/Committee of the Whole
Board of Directors

FROM: Anthony R. Parham Sr., Paratransit Operations Manager

SUBJECT: Acceptance of SunDial Operational Notes for December 2025

Recommendation:

Recommend that the Board of Directors (Board) approve the SunDial Operational Notes for December 2025.

Background:

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 December 2025 where 7,547, which is a decrease of 671 passengers or 8.1% when compared to December 2024. Mobility device boardings for December 2025 decreased by 548 or 45.8% when compared to December 2024. During this month, the Field Supervisors conducted a total of 65 on-board inspections and 60 safety evaluations, which included pre-trip inspections and trailing evaluations. The Field Supervisors have exceeded their monthly on-board evaluations goal of 60 by 5, which is a decrease of 20.7% when compared to December 2024. Similarly, they also met the safety evaluation goal of 60, this reflects a 26.8% decline from December 2024.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

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.

In Collaboration with:

N/A

Approved/Reviewed by:

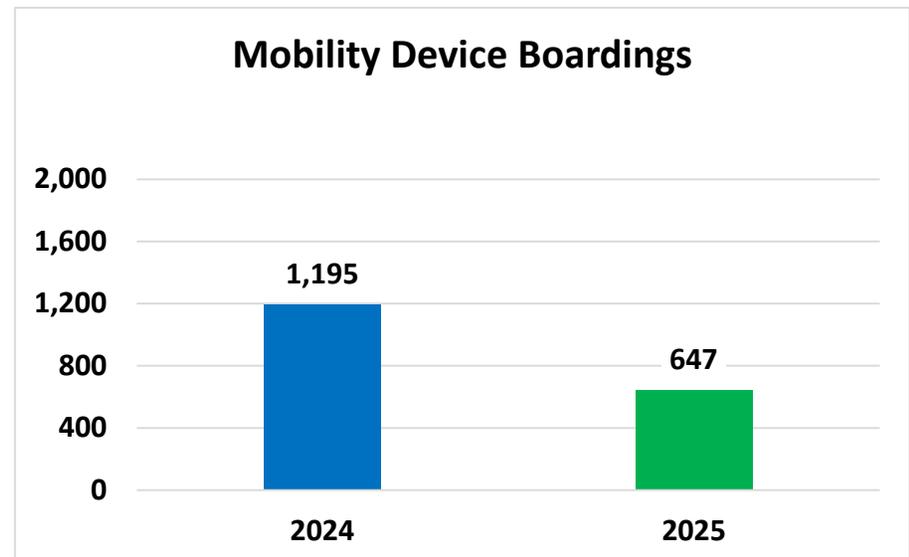
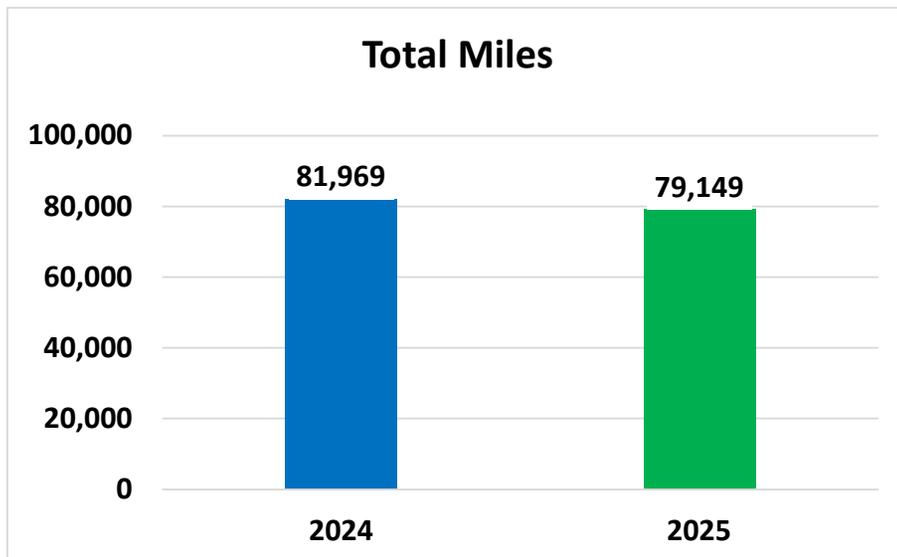
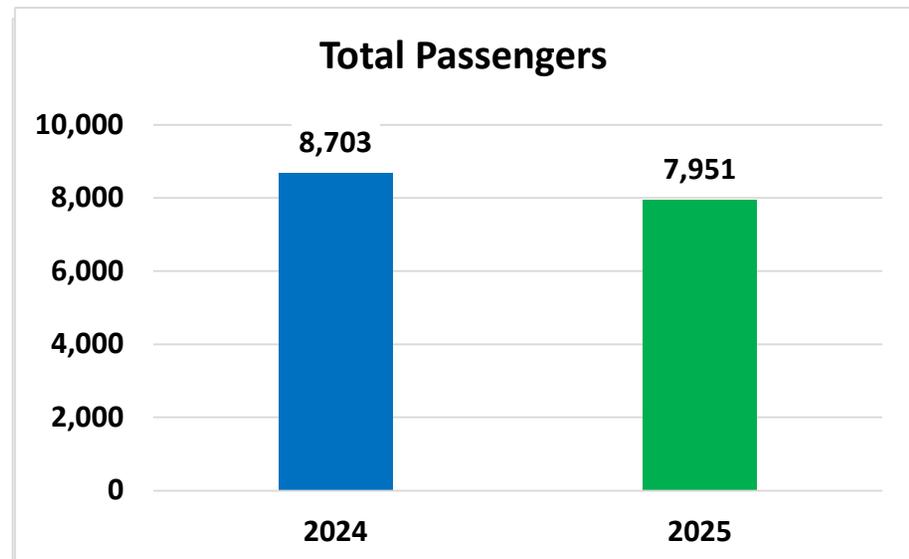
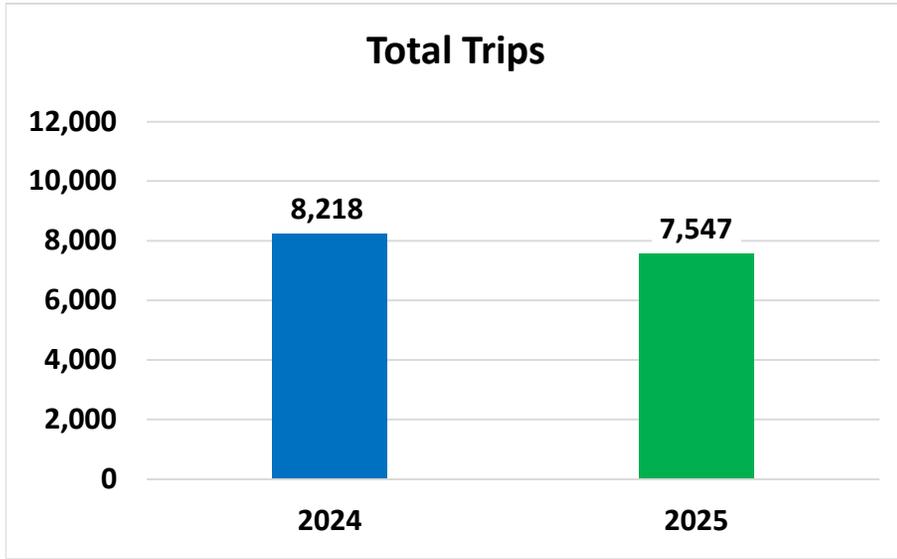
David Estrada, Deputy Chief of Transit Operations
Isabel Vizcarra, Chief Transportation Officer

Attachments:

- Operational Notes December 2025
- Total Trips vs. Late Cancellations December 2025

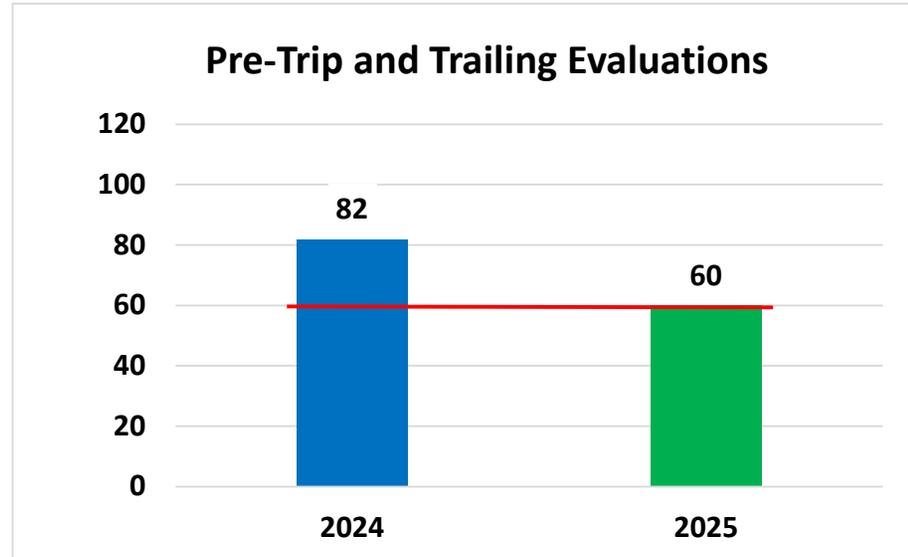
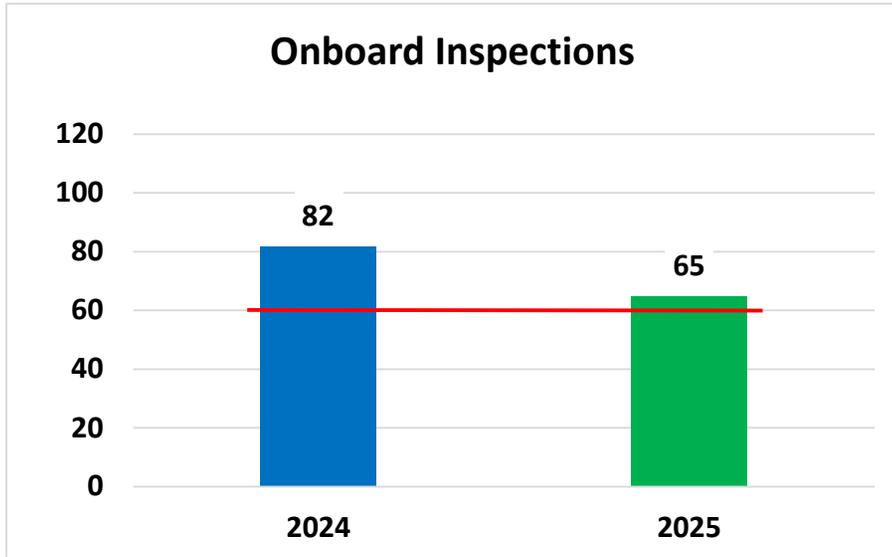
Paratransit Operational Charts

December 2024 vs. December 2025



Paratransit Operational Charts

December 2024 vs. December 2025





Board Report

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Finance/Audit Committee/Committee of the Whole
Board of Directors

FROM: Operations, Finance and Strategic Alignment Departments

SUBJECT: Acceptance of Metrics for December 2025

Recommendation:

Recommend that the Board of Directors (Board) approve the metrics for December 2025.

Background:

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.

SunRide

December Ridership:

- Total Ridership: 1,928 passengers – increase of 9% compared to 1,767 passengers in November 2025.
- Cathedral City: 204 passengers – increase of 21% in ridership compared to 169 passengers in November 2025.
- Coachella: 143 passengers – increase of 32% in ridership compared to 108 passengers in November 2025.
- Desert Hot Springs/Desert Edge: 191 passengers – increase of 6% in ridership compared to 181 passengers in November 2025.

- Indio: 657 passengers – decrease of 2% in ridership compared to 671 passengers in November 2025.
- La Quinta: 37 passengers – increase of 48% in ridership compared to 25 passengers in November 2025.
- Mecca/NorthShore: 46 passengers – increase of 21% in ridership compared to 38 passengers in November 2025.
- Palm Desert: 494 passengers – increase of 30% in ridership compared to 380 passengers in November 2025.
- Palm Springs: 159 passengers – decrease of 18% in ridership compared to 195 passengers in November 2025.

Fixed Route

On-Time Performance:

Fixed route's on-time performance increased slightly by 0.50% from 86.34% in November 2025 to 86.84% in December 2025. The agency exceeded the service standard goal of 85% for December.

- Route 1WV did not meet its service standard goal for December due to ongoing roadwork on Hy 111 and Indian Canyon. There were also route delays due to seasonal traffic in Palm Springs and road closures on Indian Canyon.
- Route 2 did not meet its service standard goal for December due to ongoing roadwork on Hwy 111 and Perez Road. There were also significant traffic delays on Palm Drive in Desert Hot Springs.
- Route 4 did not meet its service standard goal for December due to high volumes of Palm Springs construction and road work. Peak travel times and holiday events often created long delays on major roadways.

Late and Early Departures:

- Late departures decreased by 0.37% in December compared to the previous month.
- Early departures decreased by .12% in December compared to the previous month.

Workforce:

- For the month of December, 19% of SunLine's fixed route operator workforce was absent when compared to December 2024 at 23%.
- For the month of December, workforce was at a total of 133 operators when compared to December 2024 at 133 operators, the exact amount.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

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.

In Collaboration with:

N/A

Approved/Reviewed by:

Luis Garcia, Chief Financial Officer

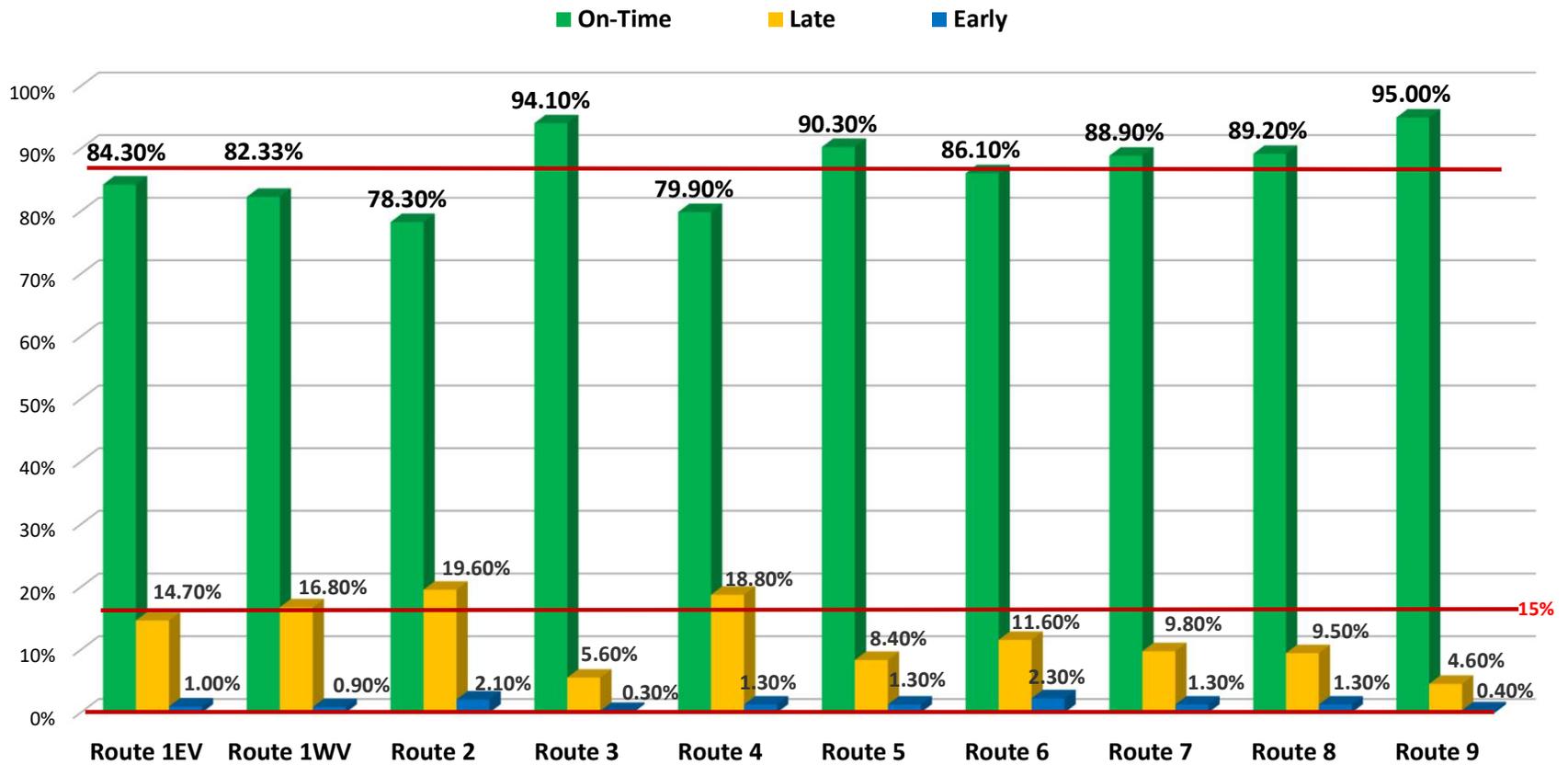
Isabel Vizcarra, Chief Transportation Officer

Greg Wildman, Chief of Strategic Alignment

Attachments:

- Fixed Route On-Time Performance, Early and Late Departure by Route
- Paratransit Total Trips vs. Late Cancellations
- Operator Absences vs. Daily Operators Needed
- Fixed Route and Paratransit Customer Complaints
- Advertising Revenue
- SunRide System-Wide and Geo-Fence Metrics

On-Time Performance Metrics for December 2025

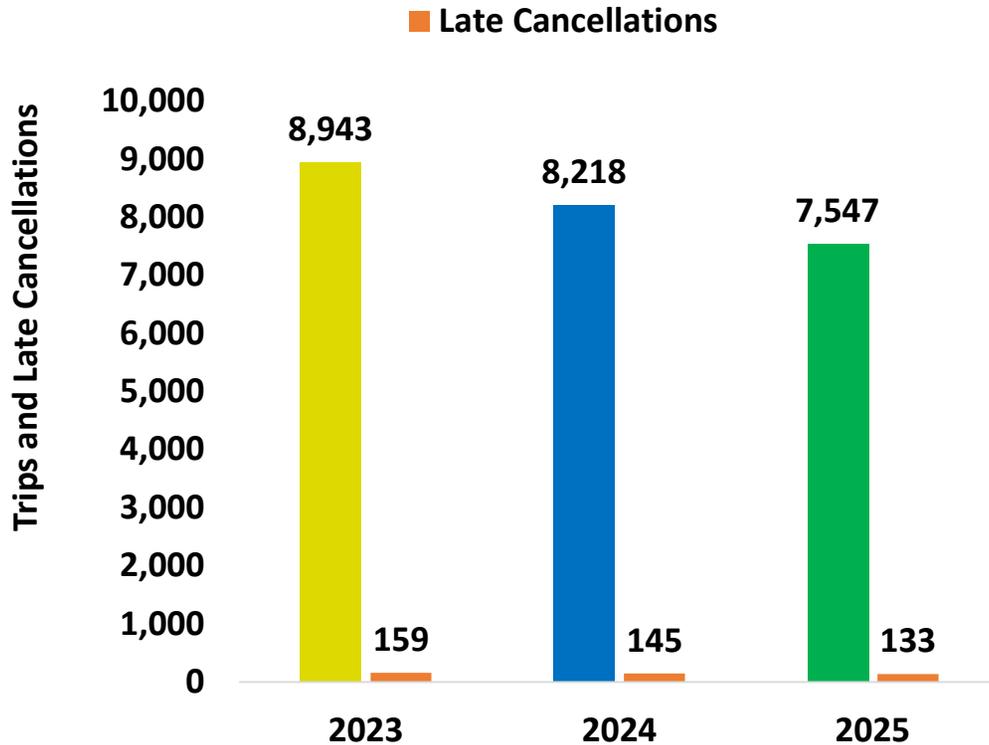


Goal: Early trips ≤ 0, Late Trips below 15%, On-Time Performance Goal of 85%.

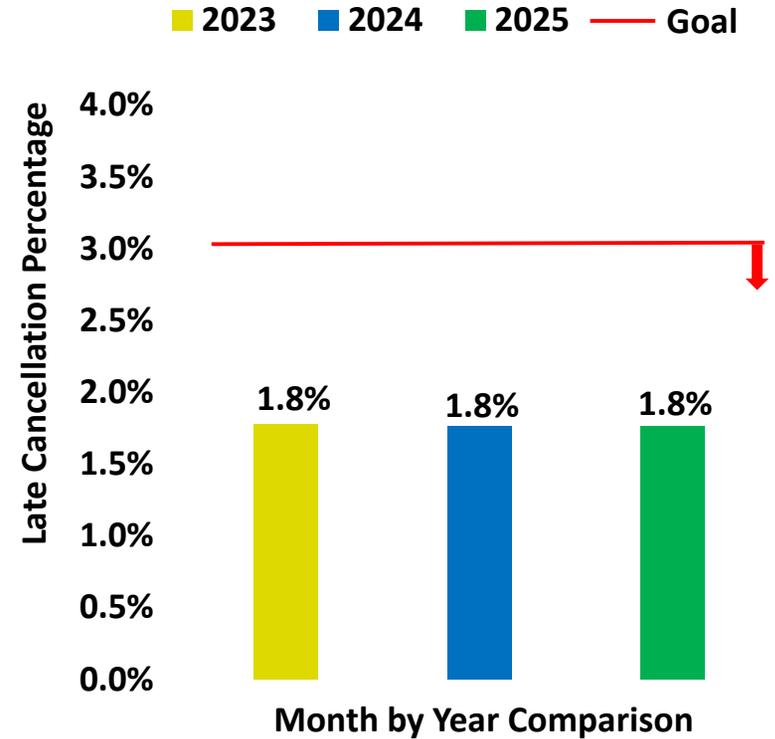
Total Monthly Scheduled Stops for December: 45,862.

*Note: Metrics are calculated using Swiftly Suite at timepoints only: -1 Minute (Early) to +5 Minute (Late) for OTP Trips.

Paratransit Total Trips vs. Late Cancellations December 2025



Late Cancellations by Percentage



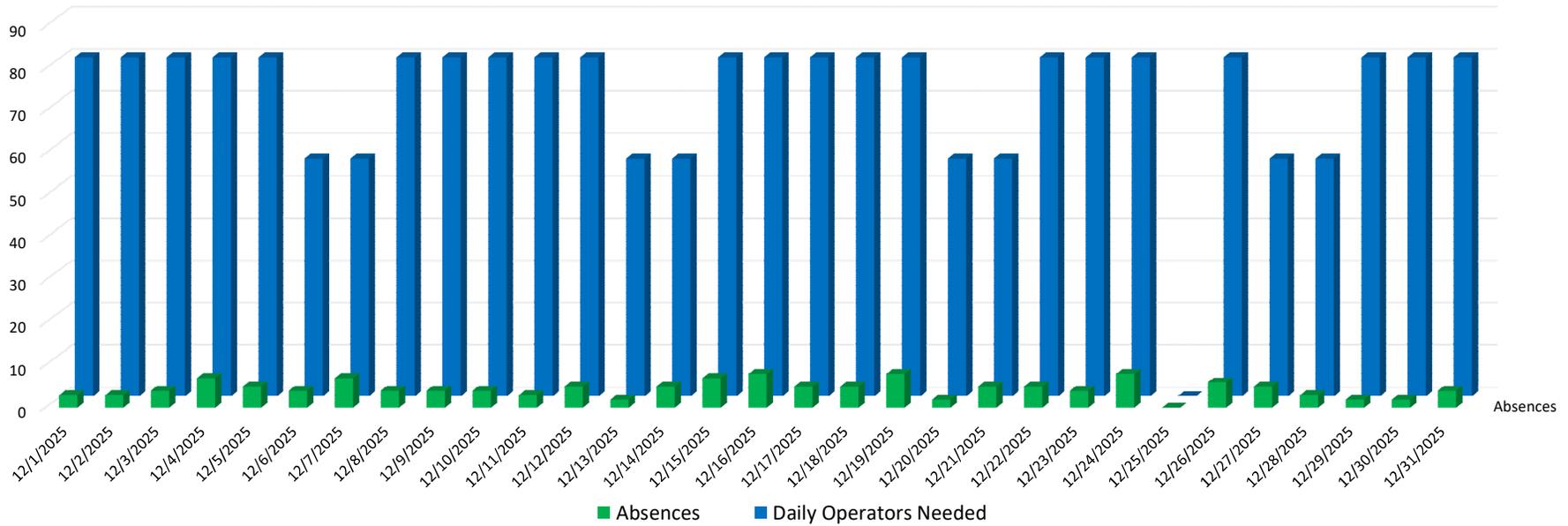
Trip: A one-way trip booked by the rider. A round trip is counted as two (2) trips.

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.

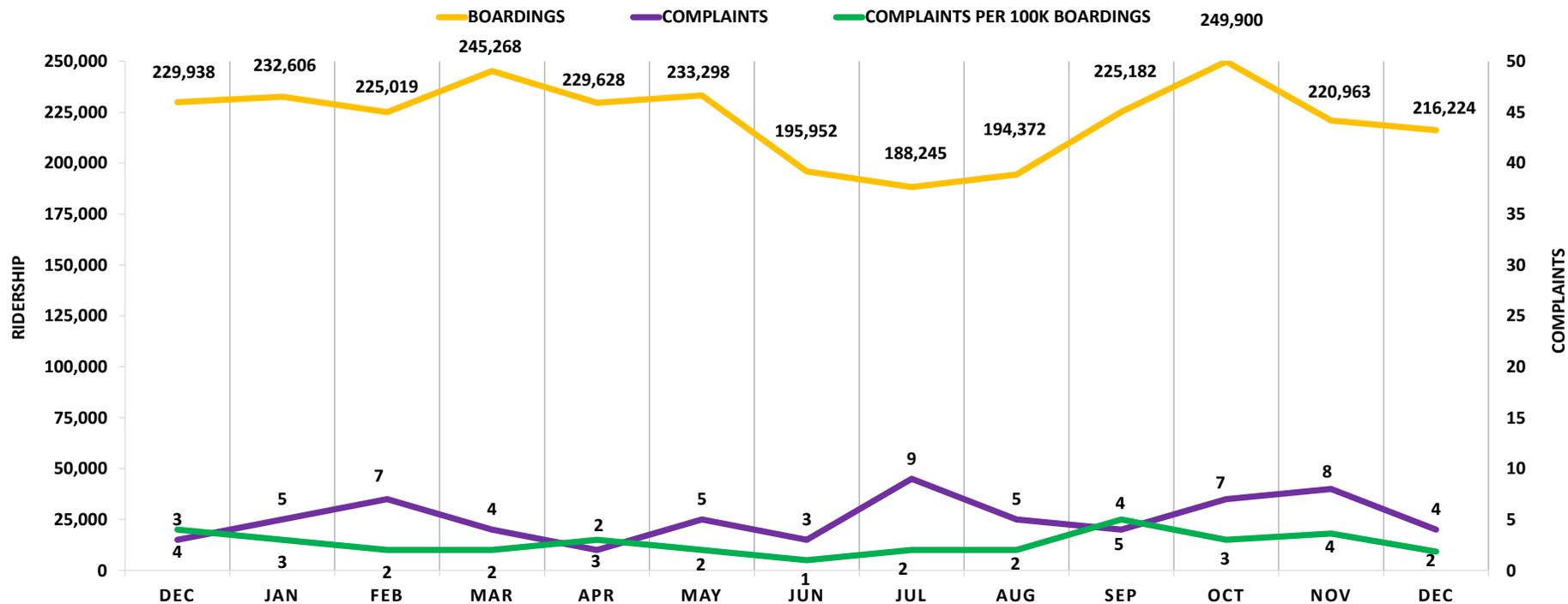
Total Trips: Total one-way trips completed.

Daily Operator Absences vs Daily Operators Needed December 2025



*Number of daily Fixed Route operator absence occurrences by day of the week and total number of operators needed for daily service. Absences include Unplanned/Unscheduled Sick Calls, Intermittent FMLA & Miss-Outs.

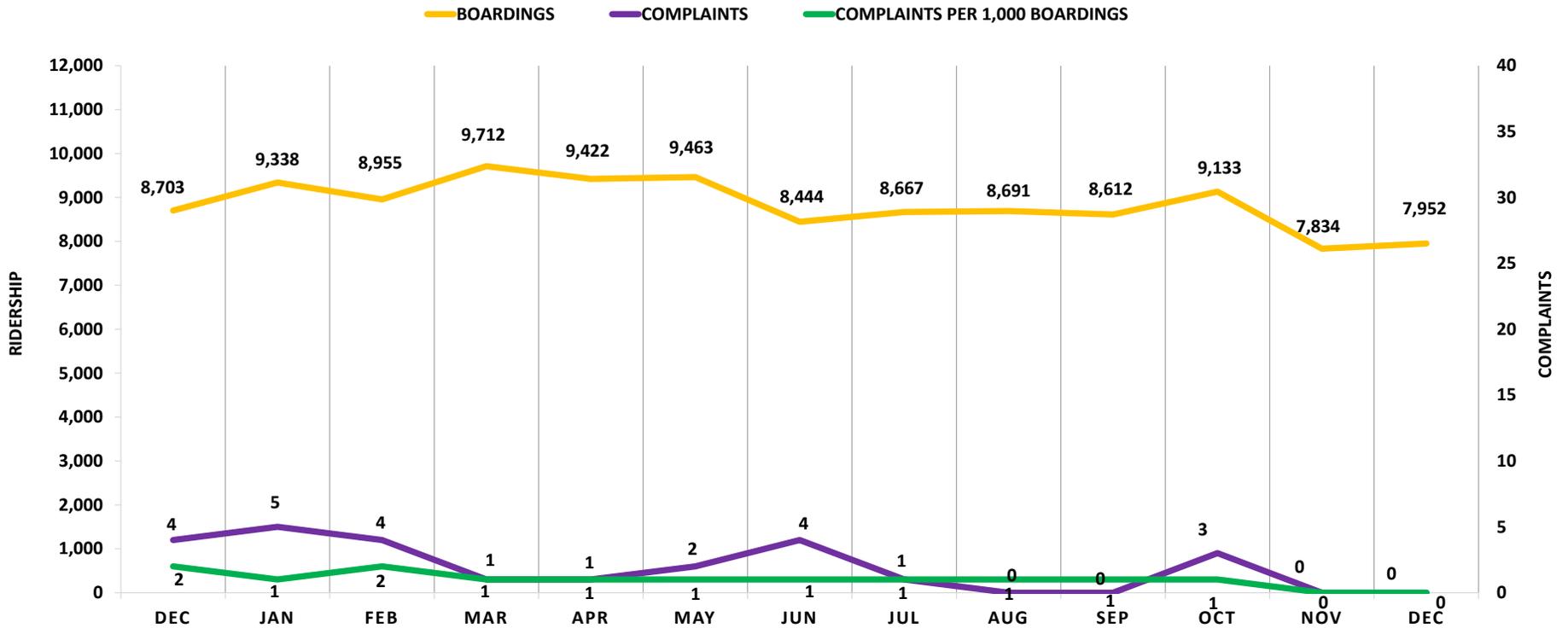
Fixed Route Customer Complaints December 2024 to December 2025



This chart represents the number of boardings and total valid complaints, as well as the number of valid complaints per 100,000 boardings for the fixed route system.

For the month of December, 99.99% of our total boardings did not receive a complaint.

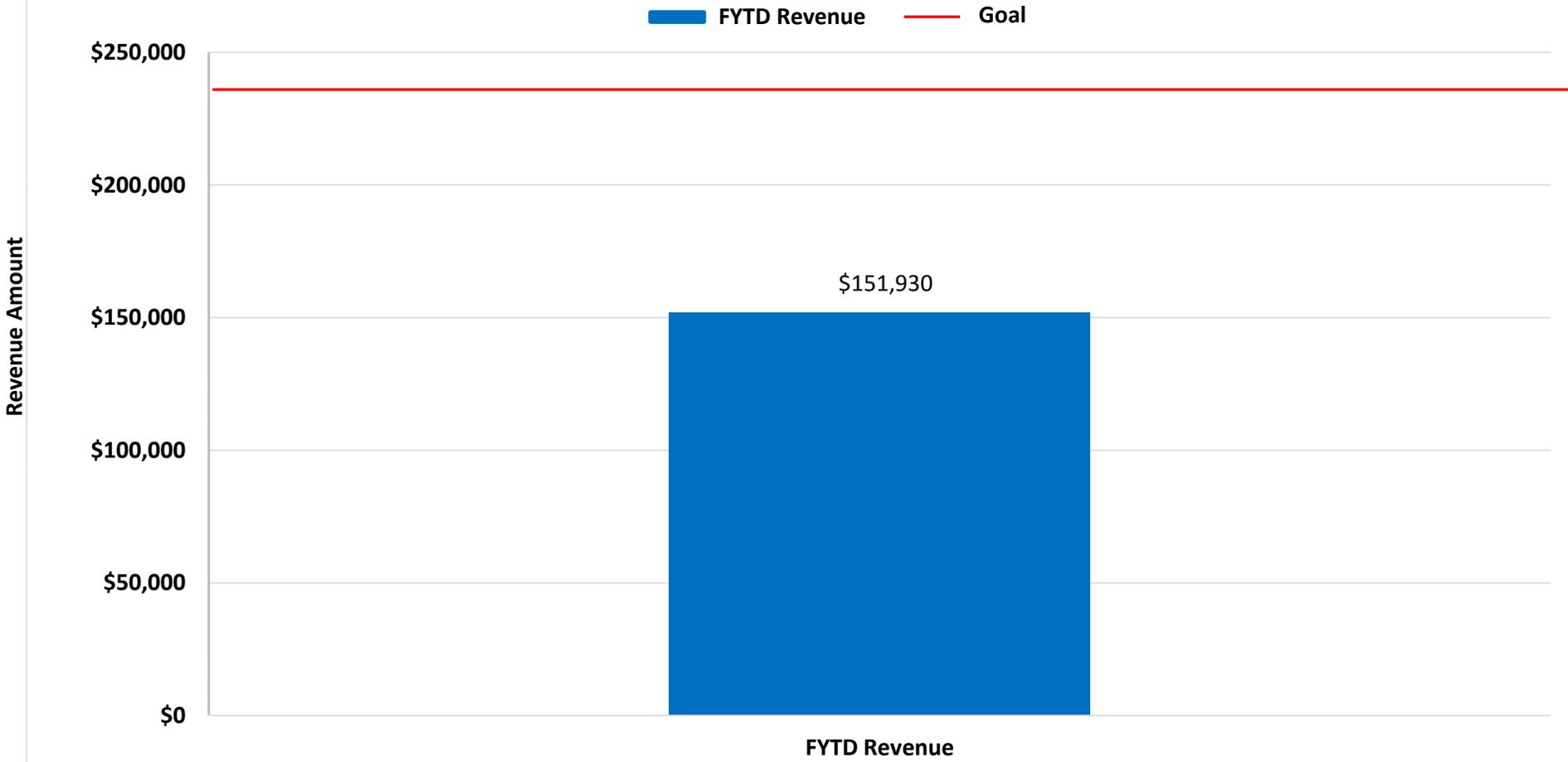
Paratransit Customer Complaints December 2024 to December 2025



This chart represents the total number of boardings and valid complaints, as well as the number of valid complaints per 1,000 boardings for the paratransit service.

For the month of December, 100% of our total boardings did not receive a complaint.

Advertising Revenue FYTD Revenue vs. Yearly Goal December 2025

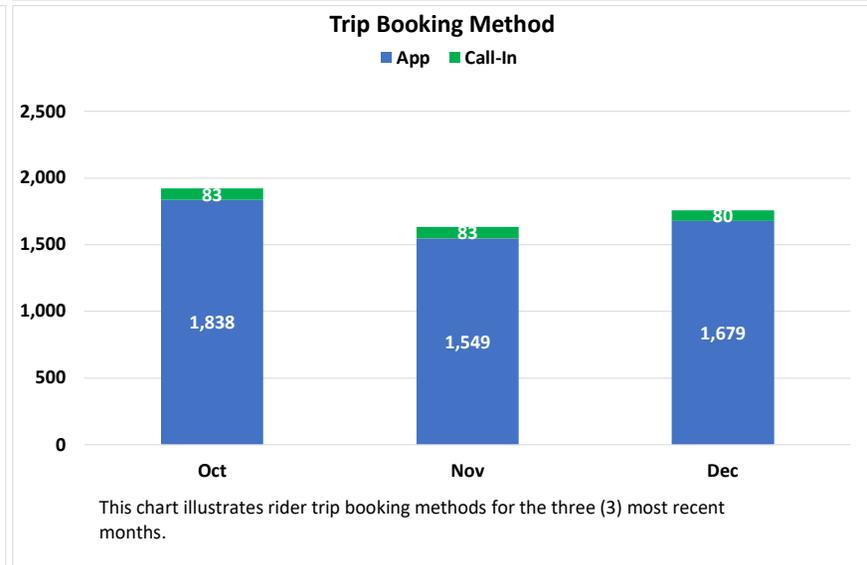
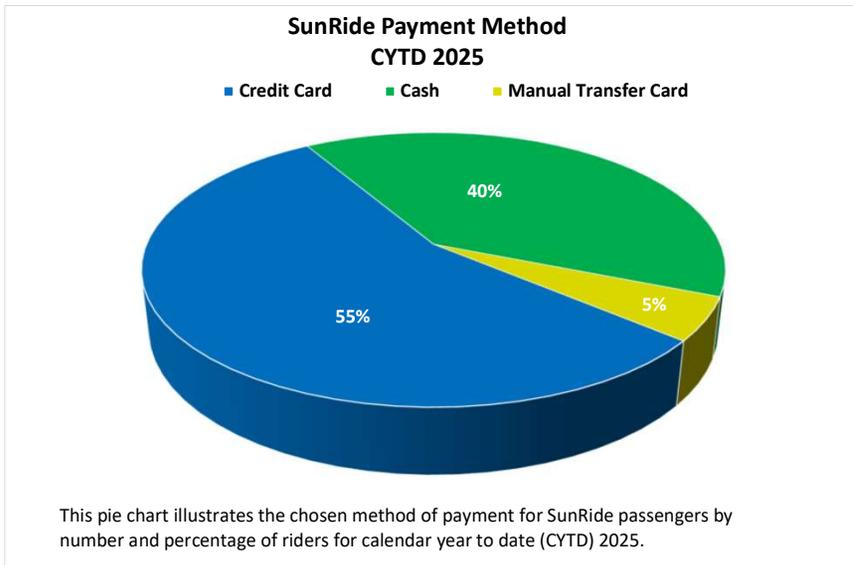
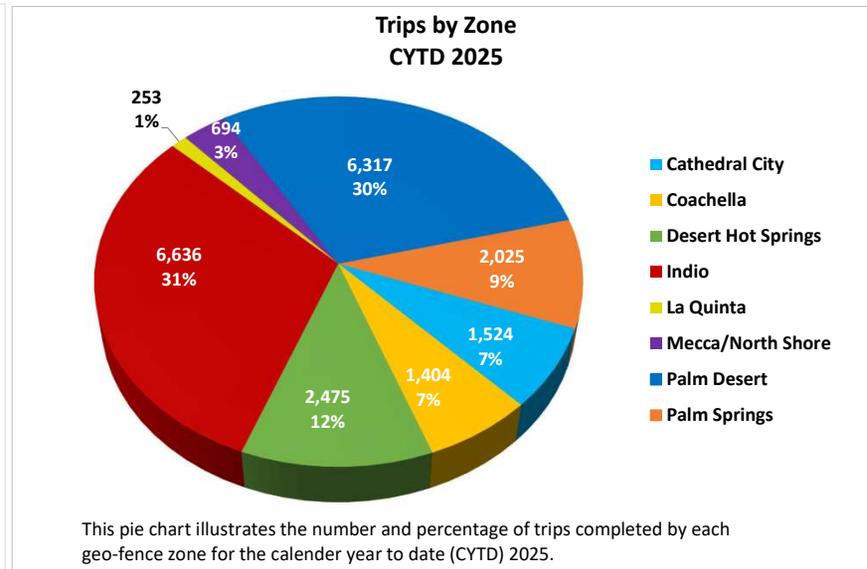
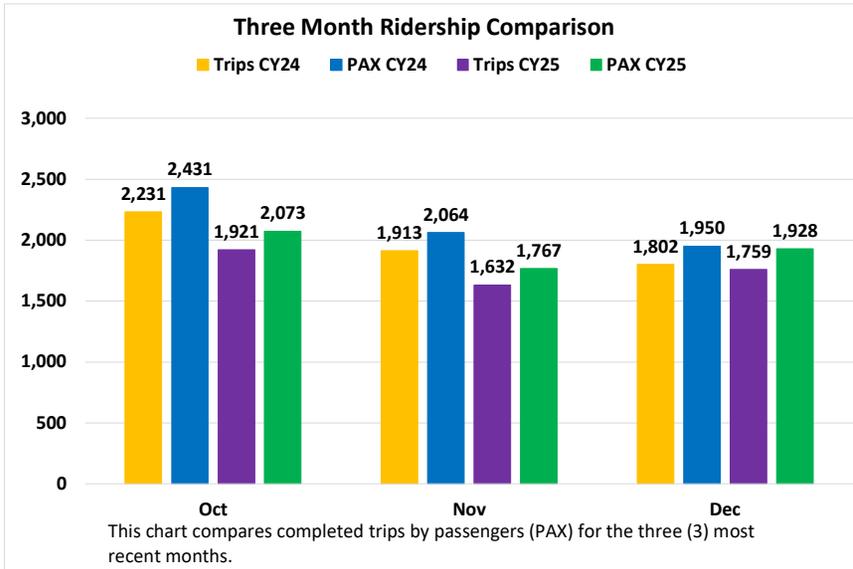


Advertising revenue tracks revenue earned for bus shelter and bus wrap advertising. The graph tracks FYTD revenue versus our yearly budget. The yearly budget for FY26 is \$240,000 (*advertising revenues follow Finance Department reporting from the previous two (2) months*).

SunRide System-Wide Metrics CYTD 2025

Total Completed Trips: 21,328

Total Number of Passengers: 23,111



Passengers Per Vehicle Hour: 2.1

Percentage of Trips System-wide as Ridesharing: 23%.

[Based on No. of Shared Rides for the month (398) divided by Total Trips Completed (1,759).]

Customer Satisfaction Rating

Avg. rider trip rating 4.9
Goal: 4.5



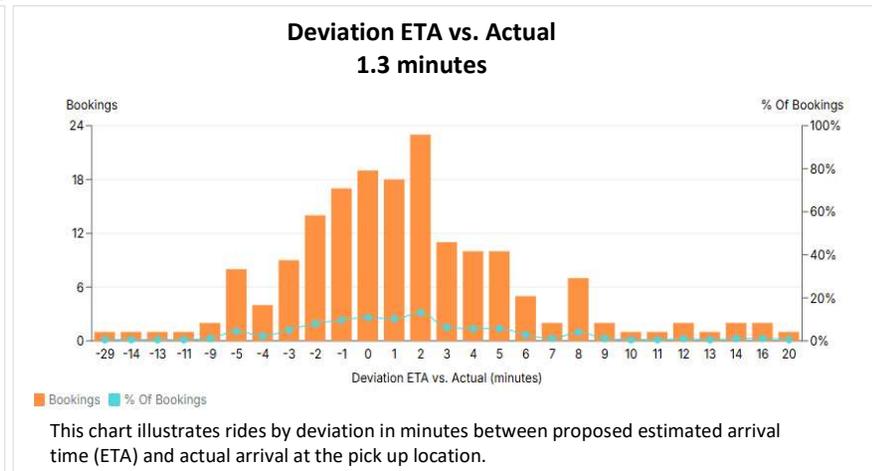
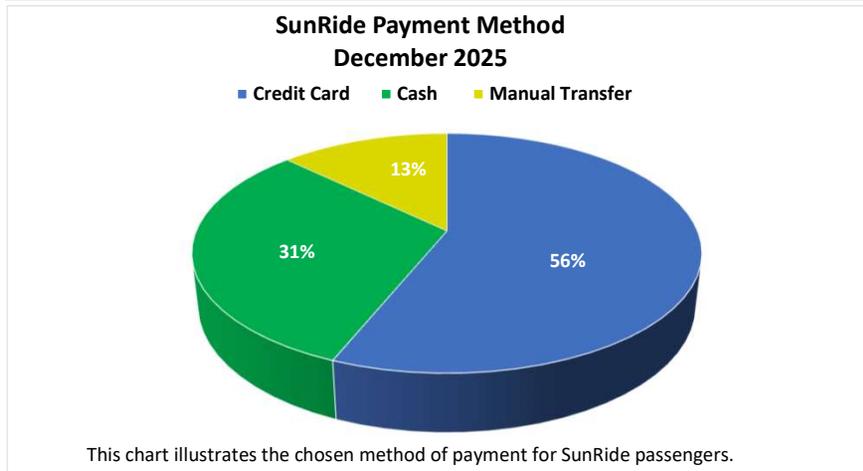
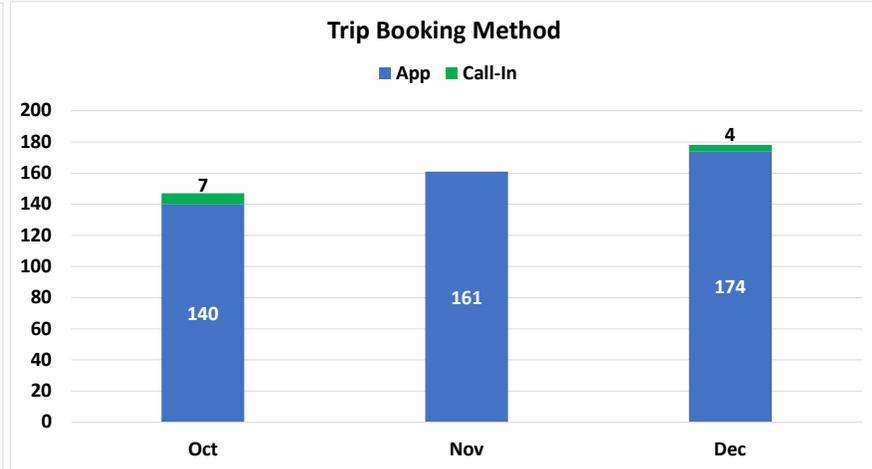
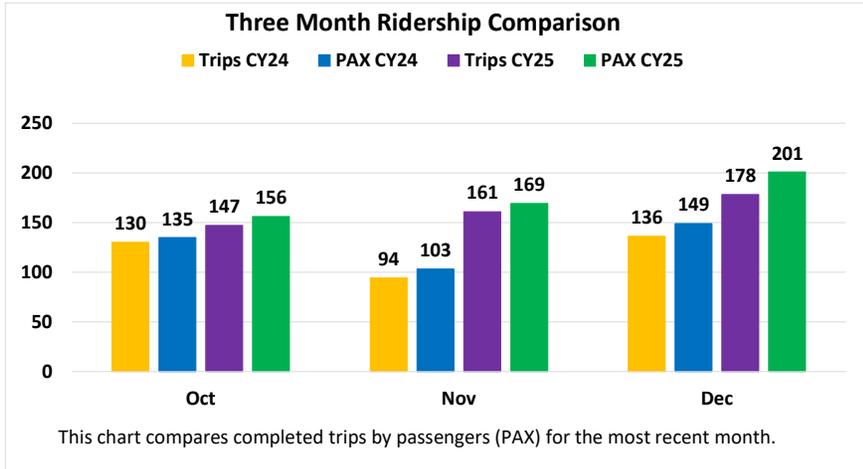
Booking with a Rating:

456 (26%)

Cathedral City Geo-Fence Metrics CYTD 2025

Total Completed Trips: 1,524

Total Number of Passengers: 1,615



Passengers Per Vehicle Hour: 2.3

Percentage of Trips as Ridesharing: 19%.

[Based on No. of Shared Rides for the month (33) divided by Total Trips Completed (178).

Customer Satisfaction Rating

Avg. rider trip rating 4.9

Goal: 4.5



EXCEEDS GOAL

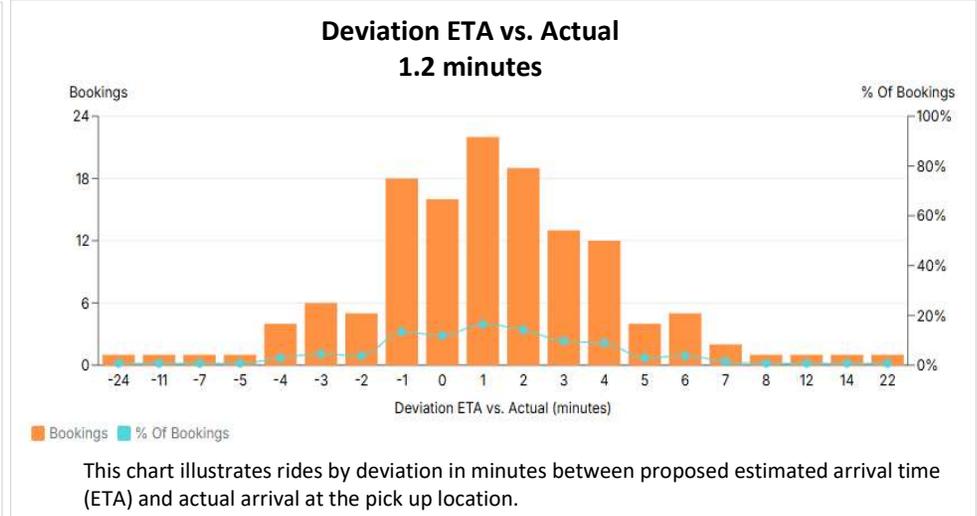
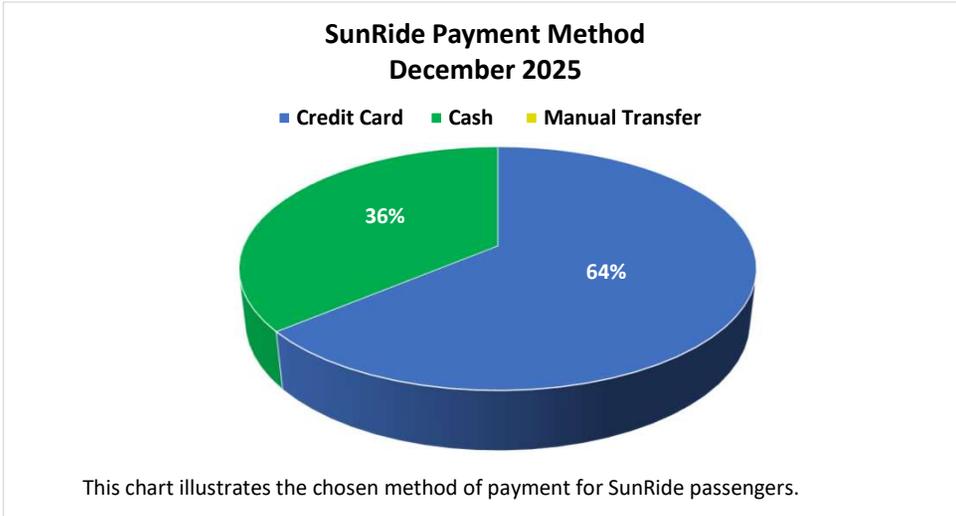
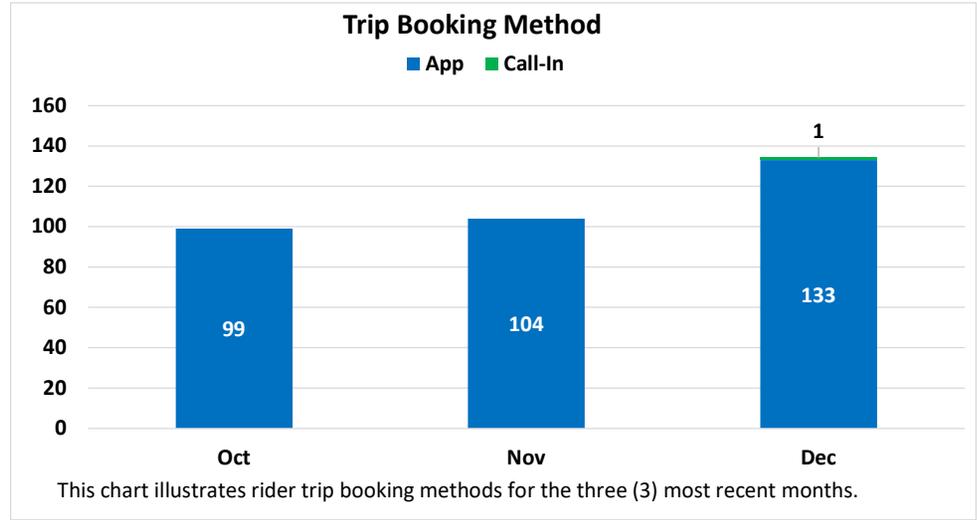
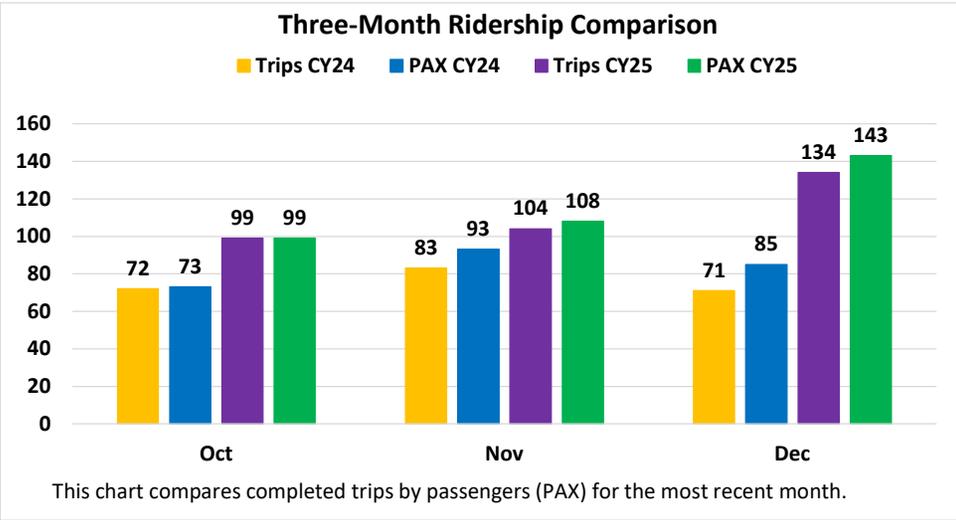
Booking with a Rating:

33 (18.5%)

Coachella Geo-Fence Metrics CYTD 2025

Total Completed Trips: 1,404

Total Number of Passengers: 1,492



Passengers Per Vehicle Hour: 2.1

Percentage of Trips as Ridesharing: Seven (7) percent.

[Based on No. of Shared Rides for the month (10) divided by Total Trips Completed (133).]

Customer Satisfaction Rating

Avg. rider trip rating: 4.9

Goal: 4.5



EXCEEDS GOAL!

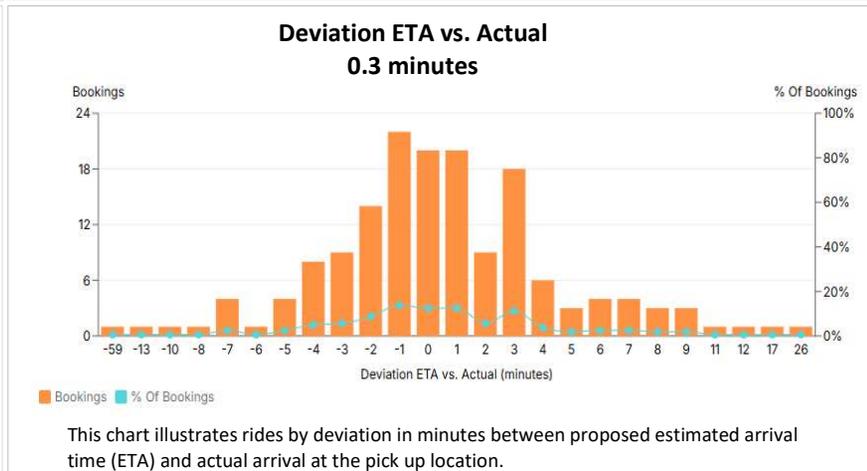
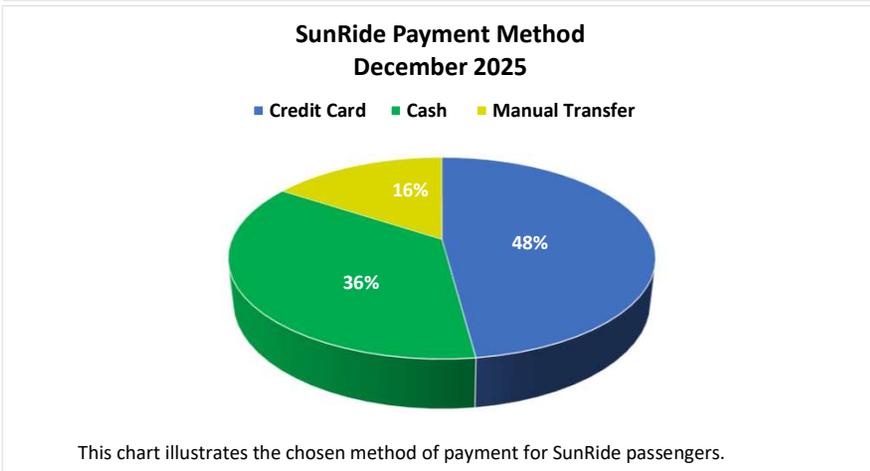
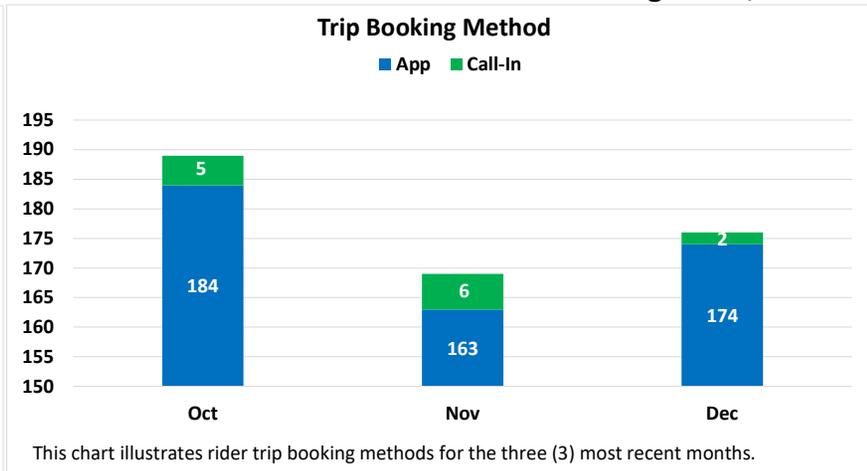
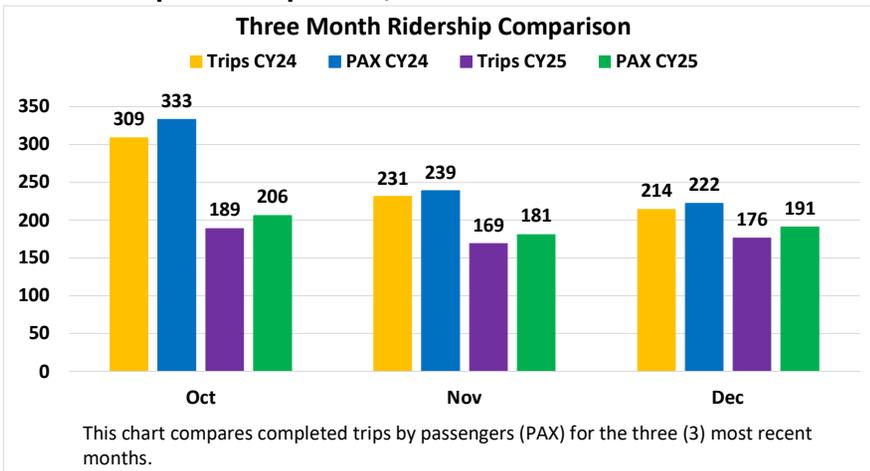
Booking with a Rating:

57 (42.5%)

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

Total Completed Trips: 2,475

Total Number of Passengers: 2,699



Passengers Per Vehicle Hour: 2.1

Percentage of Trips as Ridesharing: 24%.

[Based on No. of Shared Rides for the month (43) divided by Total Trips Completed (176).]

Customer Satisfaction Rating

Avg. rider trip rating 4.9

Goal: 4.5



EXCEEDS GOAL

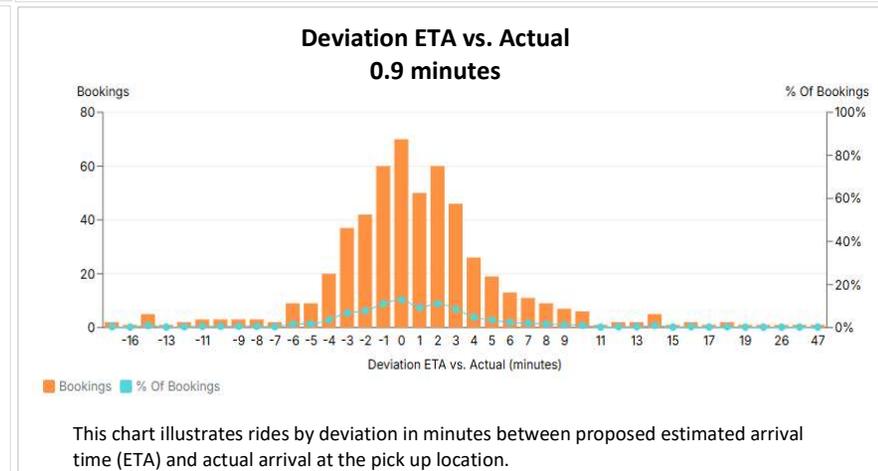
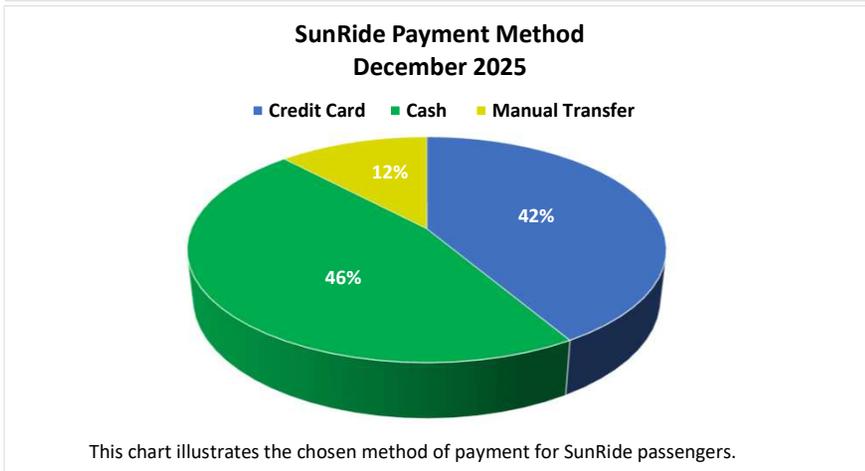
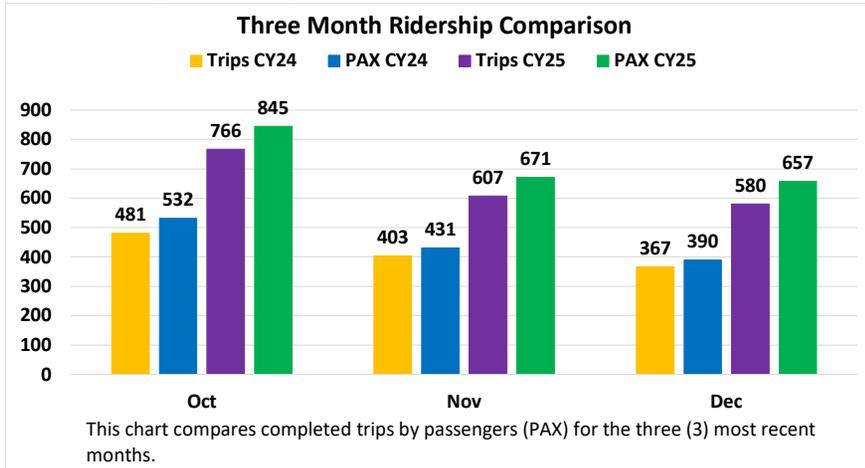
Booking with a Rating:

49 (27.8%)

Indio Geo-Fence Metrics CYTD 2025

Total Completed Trips: 6,636

Total Number of Passengers: 7,298



Passengers Per Vehicle Hour: 2.3

Percentage of Trips as Ridesharing: 27%.

[Based on No. of Shared Rides for the month (159) divided by Total Trips Completed (580).]

Customer Satisfaction Rating

Avg. rider trip rating 4.9

Goal: 4.5



EXCEEDS GOAL

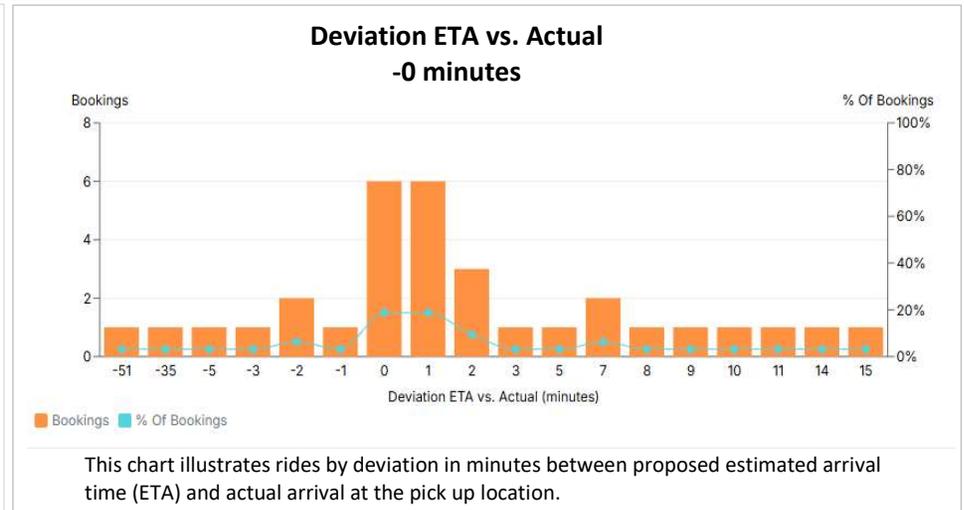
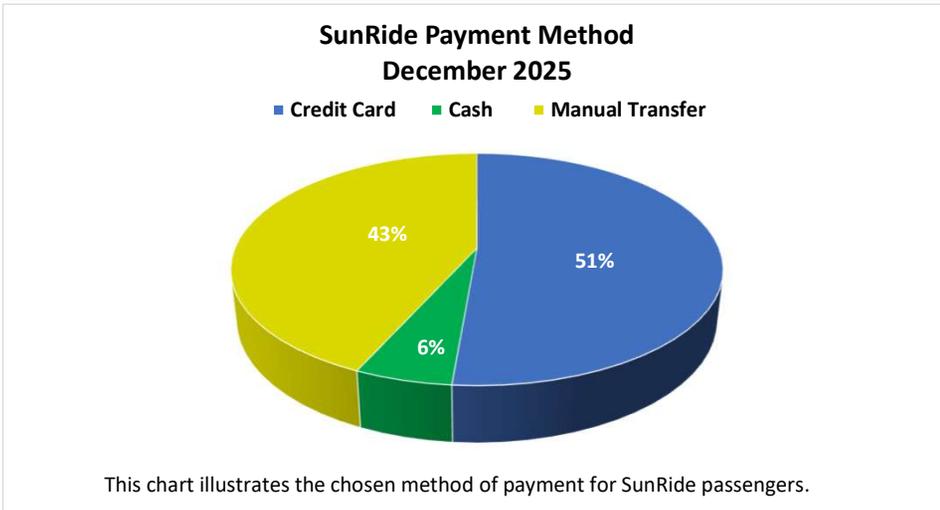
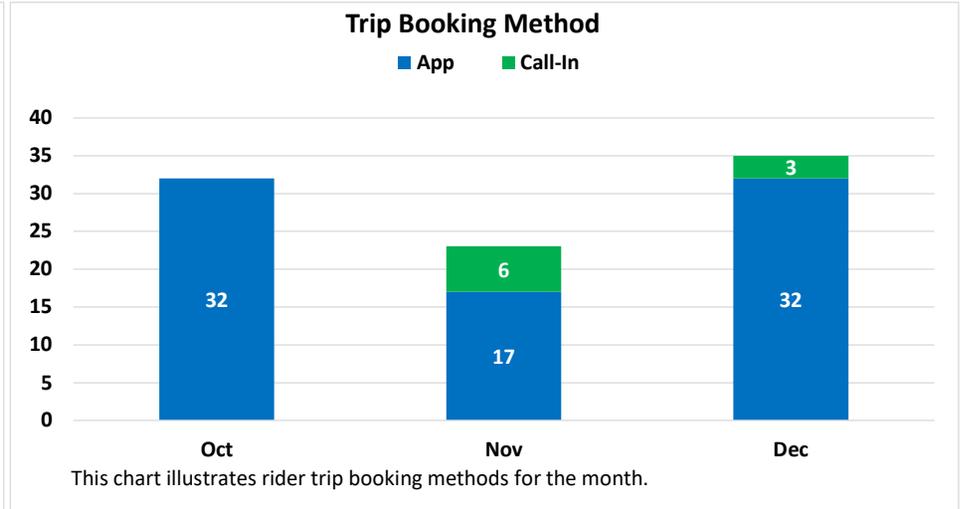
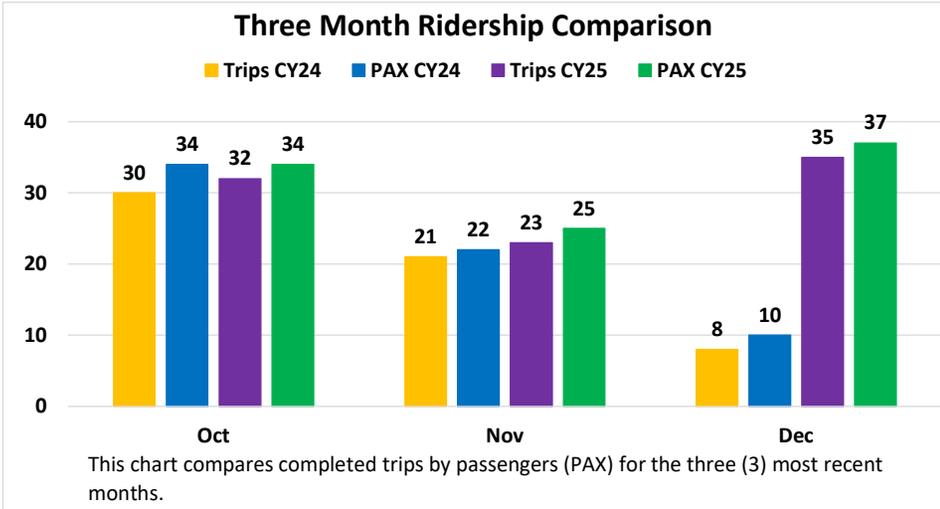
Booking with a Rating:

115 (19.8%)

La Quinta Geo-Fence Metrics CYTD 2025

Total Completed Trips: 253

Total Number of Passengers: 264



Passengers Per Vehicle Hour: 1.5

Percentage of Trips as Ridesharing: 20%.

[Based on No. of Shared Rides for the month (7) divided by Total Trips Completed (35).]

Customer Satisfaction Rating

Avg. rider trip rating: 5.0

Goal: 4.5



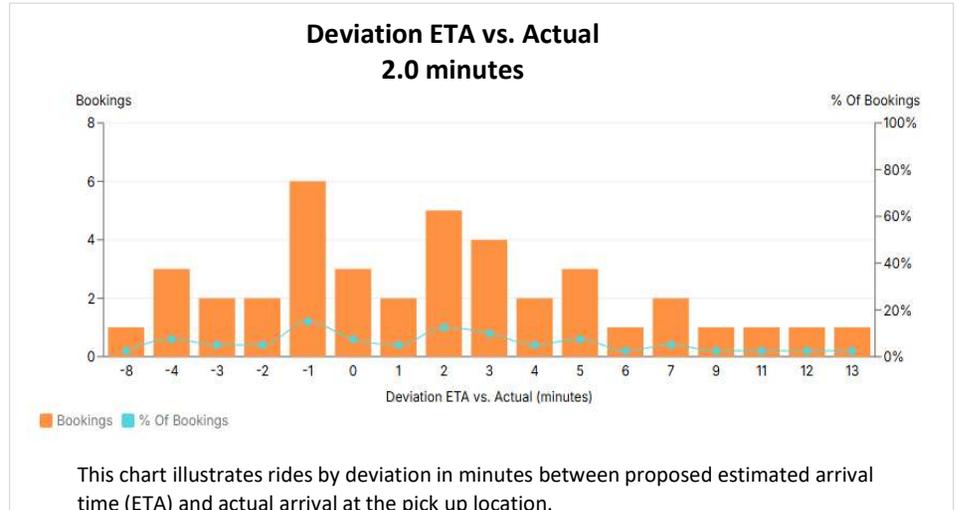
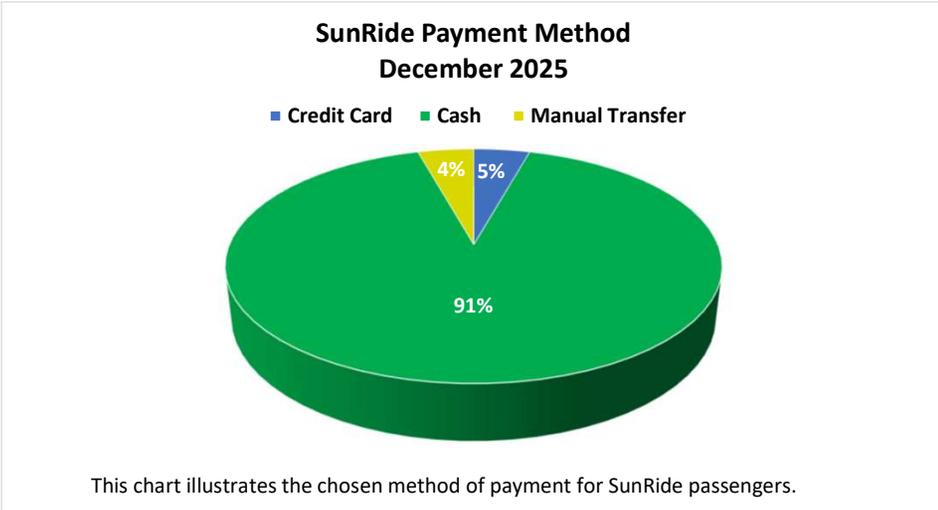
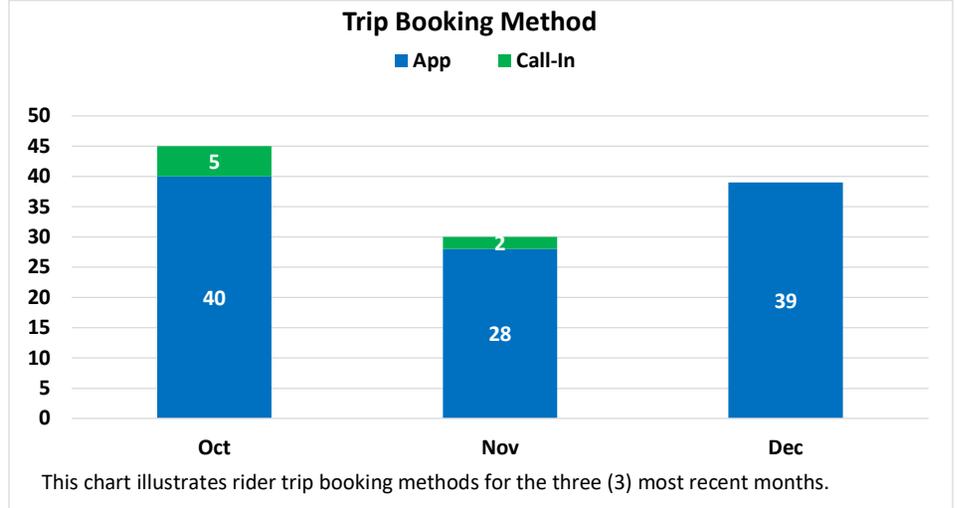
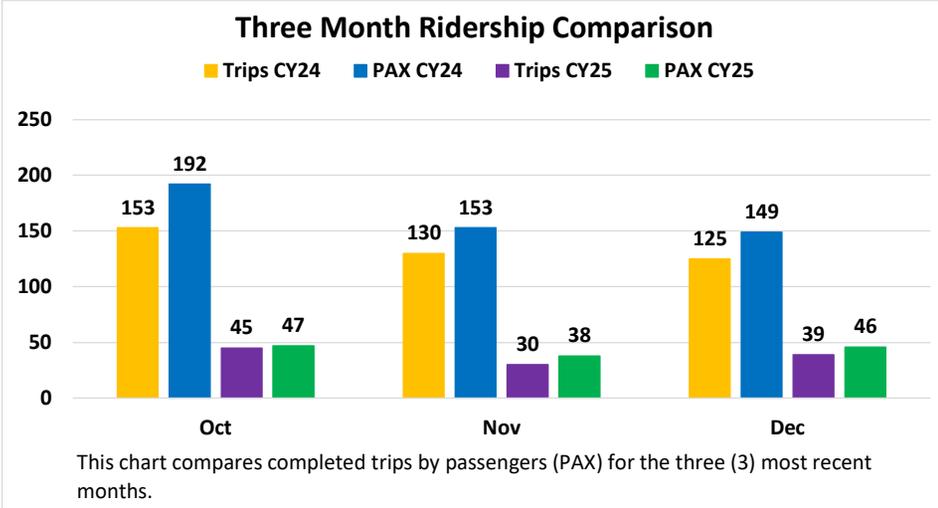
Booking with a Rating:

17 (48.6%)

Mecca/North Shore Geo-Fence Metrics CYTD 2025

Total Completed Trips: 694

Total Number of Passengers: 829



Passengers Per Vehicle Hour: 2.0

Percentage of Trips as Ridesharing: Five (5) percent.

[Based on No. of Shared Rides for the month (2) divided by Total Trips Completed (39).]

Customer Satisfaction Rating

Avg. rider trip rating: 5.0

Goal: 4.5



Exceeds Goal

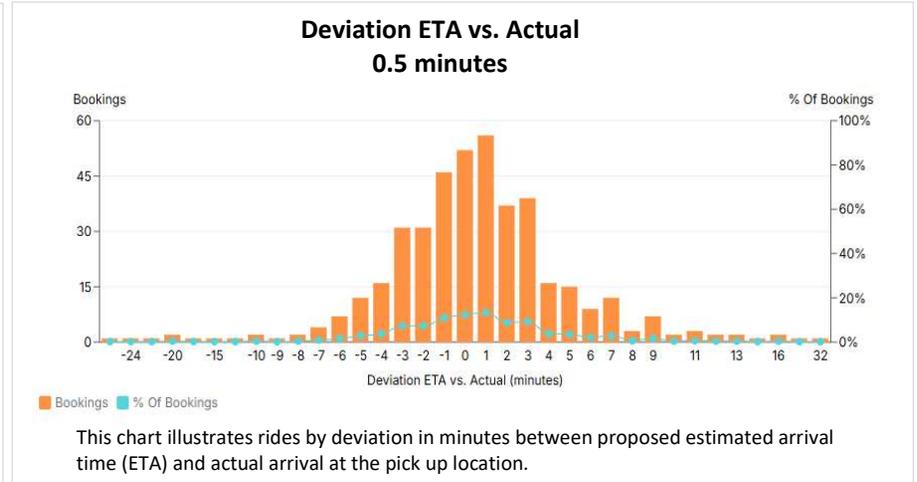
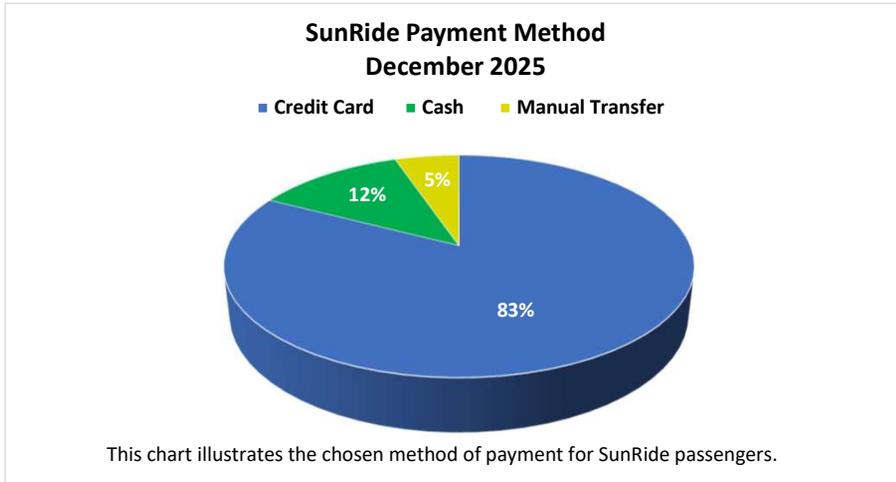
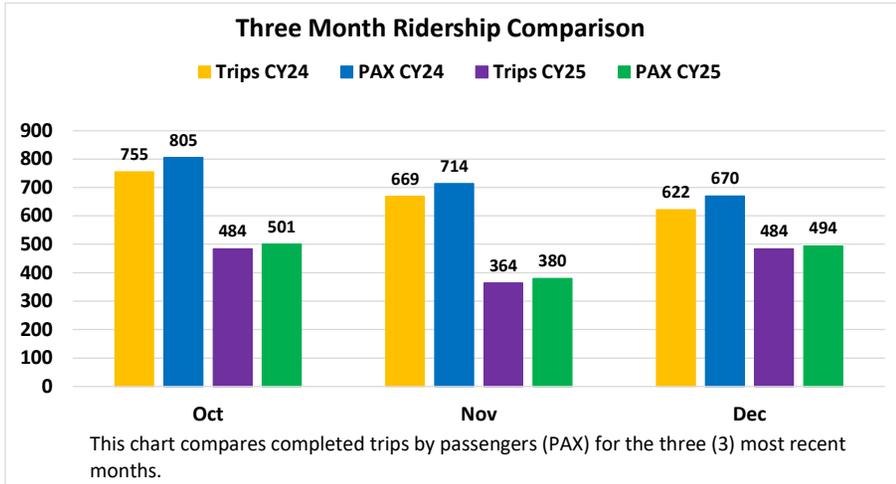
Booking with a Rating: 12

(30.8%)

Palm Desert Geo-Fence Metrics CYTD 2025

Total Completed Trips: 6,317

Total Number of Passengers: 6,641



Passengers Per Vehicle Hour: 1.9

Percentage of Trips as Ridesharing: 23%.

[Based on No. of Shared Rides for the month (112) divided by Total Trips Completed (484).]

Customer Satisfaction Rating

Avg. rider trip rating: 5.0

Goal: 4.5



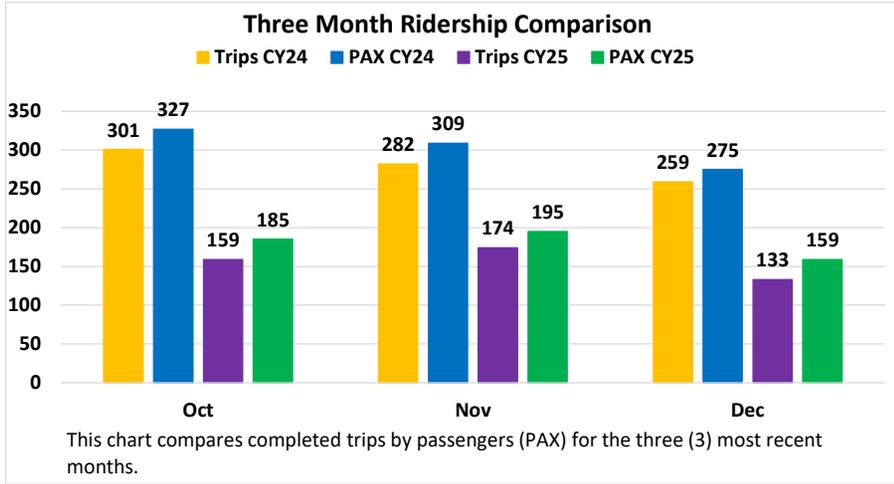
EXCEEDS GOAL!

Booking with a Rating:

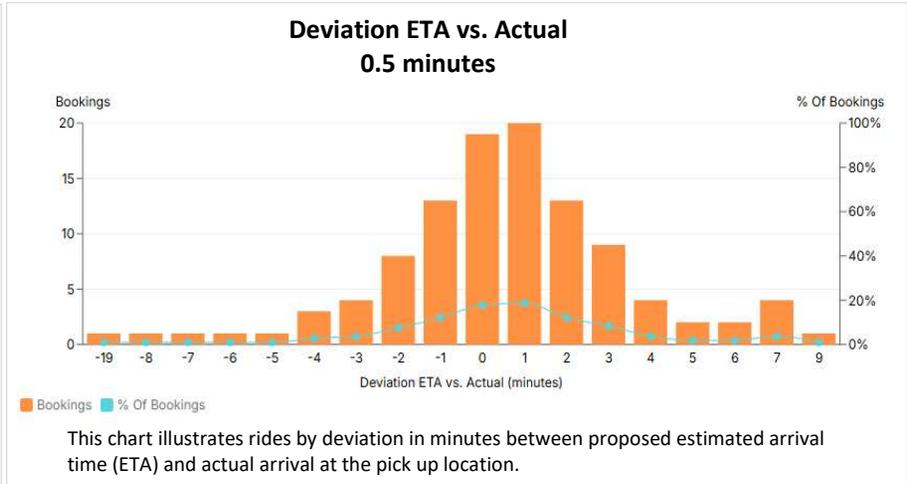
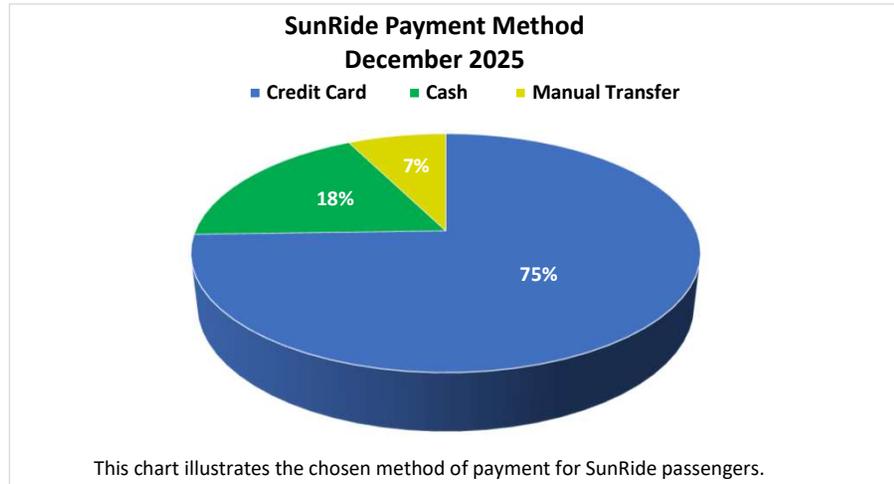
140 (29%)

Palm Springs Geo-Fence Metrics CYTD 2025

Total Completed Trips: 2,025



Total Number of Passengers: 2,273



Passengers Per Vehicle Hour: 2.0

Percentage of Trips as Ridesharing: 24%.

[Based on No. of Shared Rides for the month (32) divided by Total Trips Completed (133).]

Customer Satisfaction Rating

Avg. rider trip rating 5.0

Goal: 4.5



EXCEEDS GOAL

Booking with a Rating:

33 (24.8%)



SunLine Transit Agency

Item 8I

February 25, 2026

Board Report

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Finance/Audit Committee/Committee of the Whole
Board of Directors

FROM: Vanessa Ordorica, Clerk of the Board

SUBJECT: Acceptance of Board Member Attendance for January 2026

Recommendation:

Recommend that the Board of Directors (Board) approve the Board Member attendance for January 2026.

Background:

The attached report summarized the Board of Director's attendance for fiscal year to date January 2026.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management be effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

Selena Rodriguez, Board and External Affairs Coordinator

Approved/Reviewed by:

Vanessa Ordorica, Clerk of the Board

Attachments:

- Board Member Attendance Matrix for January 2026

FY 26/27	Board Member Matrix Attendance													
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total Meetings	Total Attended
Desert Hot Springs		X	X	X		X	X						10	5
Palm Desert		X	X	X			X						10	4
Palm Springs		X	X	X		X	X						10	5
Cathedral City		X	X	X		X	X						10	5
Rancho Mirage		X	X	X		X							10	4
Indian Wells		X	X	X		X	X						10	5
La Quinta		X	X	X		X	X						10	5
Indio		X	X	X		X	X						10	5
Coachella		X	X	X		X	X						10	5
County of Riverside		X	X	X		X	X						10	5

**No regular Board meeting has held in July. A Special Board Meeting was convened on August 7, 2025.*

X - ATTENDED (Primary/Alternate)

DARK –



Board Report

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Board of Directors

FROM: Vanessa Ordorica, Clerk of the Board

SUBJECT: Approval of Joint Board Meeting Minutes of January 28, 2026

Recommendation:

Recommend that the Board of Directors (Board) approve the Board meeting minutes of January 28, 2026.

Background:

The attached report summarizes the Joint Board Meeting Minutes from the Board of Directors meeting held on January 28, 2026.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

N/A

Approved/Reviewed by:

Vanessa Ordorica, Clerk of the Board

Attachments:

- Joint Board of Directors Meeting Minutes of January 28, 2026

MINUTES

Joint SunLine Transit Agency/SunLine Services Group Board of Directors Meeting January 28, 2026

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, January 28, 2026 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 12:01 p.m. by Vice-Chair Peña.

2. FLAG SALUTE

Vice-Chair Peña led the pledge of allegiance.

3. ROLL CALL

Members Present:

John Peña, Vice-Chair, SunLine Agency Board Member, City of La Quinta
Nancy Ross, SunLine Agency Board Member, City of Cathedral City
Denise Delgado, SunLine Agency Board Member, City of Coachella
Daniel Pitts, SunLine Agency Board Member, City of Desert Hot Springs
Glenn Miller, SunLine Agency Board Member, City of Indio
Karina Quintanilla, SunLine Agency Board Member, City of Palm Desert
Grace Garner, SunLine Agency Board Member, City of Palm Springs
Bruce Whitman, SunLine Agency Board Member, City of Indian Wells
Supervisor Perez, SunLine Agency Board Member, County of Riverside

Members Absent:

Lynn Mallotto, Chair, SunLine Agency Board Member, City of Rancho Mirage

4. OATH OF OFFICE

The Oath of Office was administered to newly appointed Board Member Karina Quintanilla from the City of Palm Desert. Director Quintanilla took the oath to officially serve on the SunLine Transit Agency Board of Directors.

5. FINALIZATION OF AGENDA

Agenda Item 13 was moved up on the agenda and heard as Item 11.

**SUNLINE TRANSIT AGENCY/
SUNLINE SERVICES GROUP
BOARD OF DIRECTORS MEETING - MINUTES
JANUARY 28, 2026**

6. PUBLIC COMMENTS

Two (2) public comments were made by:

- Anthony Garcia
- Robert Sneed

7. PRESENTATIONS

a) SunLine: Rides Re-Imagined Presentation

A presentation on the SunLine: Rides Re-Imagined project was provided by Jarrett Walker (participated virtually) and Manuel Soto (in-person), from Jarrett Walker + Associates.

Comments were made by:

- Board Member Ross, City of Cathedral City
- Supervisor Perez, County of Riverside
- Vice-Chair Peña, City of La Quinta
- Board Member Delgado, City of Coachella
- Mona Babauta, CEO/General Manager

b) Performance Management Renovation

A presentation on the Agency's Performance Management Renovation was provided by Tamara Miles, Chief of Human Relations.

c) 10th Annual Student Art Contest Unveiling Video

A video presentation of the 10th Annual Student Art Contest Unveiling, held in November, was shown during the meeting.

8. BOARD MEMBER COMMENTS

Board Member comments were made by:

- Supervisor Perez, County of Riverside

9. CONSENT CALENDAR

Board Member Miller moved to approve the Consent Calendar. The motion was seconded by Supervisor Perez. The motion was approved by a vote of 8 yes; 0 no; 1 abstention (Director Quintanilla abstained on Item 9J: Approval of Joint Board Meeting Minutes of December 3, 2025).

**SUNLINE TRANSIT AGENCY/
SUNLINE SERVICES GROUP
BOARD OF DIRECTORS MEETING - MINUTES
JANUARY 28, 2026**

10. FISCAL YEAR 2025 FINANCIAL AUDIT REPORT

Finance/Audit Committee/Committee of the Whole Chair Peña reported that this item was brought to the Finance/Audit Committee/Committee of the Whole and the Committee unanimously motioned to receive and file this item. Committee Chair Peña moved to receive and file the Fiscal Year 2025 Financial Audit Reports. The motion was approved by a unanimous vote of 9 yes; 0 no; 0 abstain.

**Director Delgado exited the meeting during this agenda item.*

11. UPDATE ON HYDROGEN FUELING ON-CALL ENGINEERING AND SUPPORT SERVICES TASK ORDERS

Finance/Audit Committee/Committee of the Whole Chair Peña reported that Luis Garcia, Chief Financial Officer, provided an oral report on this discussion item during the Finance/Audit Committee/Committee of the Whole and the Committee meeting. No action was taken.

12. BOARD OF DIRECTORS UPDATE: FISCAL YEAR 2026 SUNLINE STRATEGIC PRIORITIES AND GOALS

Greg Wildman, Chief of Strategic Alignment, reported that this discussion item was presented during the Strategic Planning & Operational Committee/Committee of the Whole. No action was taken.

13. APPROVE 2026 STATE AND FEDERAL LEGISLATIVE PROGRAM

An oral report was presented by Edith Hernandez, Director of Board and External Affairs, regarding this action item. Supervisor Perez moved to approve the 2026 State and Federal Legislative Program. The motion was seconded by Board Member Miller. The motion was approved by a unanimous vote of 9 yes; 0 no; 0 abstain.

**Supervisor Perez exited the meeting at 1:04 p.m.*

14. LEGISLATIVE UPDATE FOR JANUARY 2026

An oral report was provided by Edith Hernandez, Director of Board and External Affairs, along with Matt Robinson and Brendan Repicky from Shaw Yoder Antwih Schmelzer & Lange (SYASL) on this discussion item. The presentation can be viewed [here](#). No action was taken.

Comments were made by:

- Board Member Quintanilla, City of Palm Desert

**SUNLINE TRANSIT AGENCY/
SUNLINE SERVICES GROUP
BOARD OF DIRECTORS MEETING - MINUTES
JANUARY 28, 2026**

15. CEO/GENERAL MANAGER’S REPORT

CEO/General Manager, Mona Babauta, provided a brief oral update on this discussion item. No action was taken.

16. NEXT MEETING DATE

February 25, 2026 at 12 p.m.
Board Room
32-505 Harry Oliver Trail
Thousand Palms, CA 92276

17. ADJOURN

The SunLine Transit Agency and SunLine Services Group meeting concurrently adjourned at 1:25 p.m.

Respectfully Submitted,

Vanessa Ordorica
Clerk of the Board

CALIFORNIA LEGISLATIVE UPDATE

SunLine Transit Board of Directors Meeting - January 28, 2026

Matt Robinson, Partner

Brendan Repicky, Legislative Advocate

They're back!

- Legislature reconvened January 5
 - *Second year of a two-year session*
- Key upcoming deadlines
 - *January 31 – “House of Origin” deadline for two-year bills*
 - *February 20 – bill introduction deadline for new bills*
- Governor Newsom released his proposed budget on January 9

Bills of Interest

- Two-year bills
 - *AB 810 (Irwin) – Internet Websites – held*
 - *AB 1070 (Ward) – Transit District Boards – amended*
- New bills
 - *SB 908 (Wiener) – SB 79 clean-up*
 - *AB 1599 (Ahrens) – Transit stop database*
 - *AB XXXX (M. González) – Bus camera parking enforcement*
 - *Bus-axle weights*
 - *E-bikes*



2026 Budget

- Governor projects \$2.9 billion deficit
 - *LAO projects \$18 billion*
- Core transit funding programs stable (STA, TIF, LTF)
 - *STA projecting \$860 million for FY 2026-27*
- Cap-and-Invest – Under SB 840 (Limón)
 - *\$200 million for transit ops (LCTOP)*
 - *\$400 million for transit capital (TIRCP)*
 - *\$800 million for TOD (AHSCP)*
 - *\$125 million (one-time) for transit passes*



2026 Budget

- But...2026 Budget estimates less
 - *\$141 million for LCTOP*
 - *\$283 million for TIRCP*
 - *\$566 million for TOD*
- SB 125 funds not contemplated
 - *\$230 million due FY 2026-27*
 - *\$460 million due FY 2027-28*
- Heavy-duty voucher funding not contemplated (HVIP)
- ARCHES funding not contemplated



ARCHES

- Reminder – Feds committed \$1.2 billion to CA
 - *Feds pulled the funding back*
 - *State hinted at January budget proposal*
- Several transit agencies have / had funding commitments
 - *“1,000-Bus Initiative”*
 - *\$14 million was earmarked for SunLine*
- Conversations underway with Go-Biz (program administrator)
 - *No concrete plans to meet funding commitments*
 - *Continue to work on solutions*



2026 TIRCP

- Draft Guidelines Released
- February 11 – Virtual workshops
- February 18 – Deadline for comments
- February 20 – Cycle 8 Guidelines released / Call for Projects
- May 14 – Project applications due
- September 18 – Anticipated award announcements



Shaw
Yoder
Antwih
Schmelzer
& Lange

AHSCP Changes

- Budget proposes to split program (\$800 million)
 - *Affordable housing / sustainable communities*
- Affordable housing to Housing and Homelessness Agency
 - *Up to \$560 million annually from GGRF (\$396 million in FY 26-27)*
- Sustainable communities remains at SGC
 - *Focus on larger, regional priorities*
 - *May receive up to \$240 million annually from GGRF (\$170 million in FY 26-27)*
- Trailer bill language expected early February

Shaw
Yoder
Antwih
Schmelzer
& Lange



THANK YOU



SunLine Services Group

Item 8K

February 25, 2026

Board Report

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Taxi Committee/Committee of the Whole
Board of Directors

FROM: Luis Garcia, Chief Financial Officer

SUBJECT: Acceptance of Checks \$1,000 and Over Report for December 2025

Recommendation:

Recommend that the Board of Directors (Board) approve the checks \$1,000 and Over Report for December 2025.

Background:

The Checks \$1,000 and Over Report lists all the checks processed at the Agency with a value of over \$1,000 for a given month. There were no checks over \$1,000 for the month of December 2025.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

N/A

Approved/Reviewed by:

Luis Garcia, Chief Financial Officer

Attachments:

- Checks \$1,000 and Over Report for December 2025

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

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
Total Checks Over \$1,000	\$0.00			
Total Checks Under \$1,000	\$1,317.04			
Total Checks	\$1,317.04			



SunLine Services Group

Item 8L

Board Report

February 25, 2026

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Taxi Committee/Committee of the Whole
Board of Directors

FROM: Luis Garcia, Chief Financial Officer

SUBJECT: Acceptance of Monthly Budget Variance Report for December 2025

Recommendation:

Recommend that the Board of Directors (Board) approve the monthly budget variance reports for December 2025.

Background:

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 1/12th of the annual budget. The FYTD budget values for the month of December 2025 are equal to 6/12^{ths} of the yearly budget.

Year to Date Summary

- As of December 31, 2025, the organization's revenues are \$11,976 or 10.67% below the FYTD budget.
- As of December 31, 2025, expenditures are \$10,284 or 9.16% below the FYTD budget.
- The net FYTD operating gain (loss) after expenses is (\$1,692).

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

N/A

Approved/Reviewed by:

Luis Garcia, Chief Financial Officer

Attachments:

- Monthly Budget Variance Report for December 2025

SunLine Regulatory Administration
Budget Variance Report
December 2025

Description	FY26 Total Budget	Current Month			Year to Date			
		Actual	Budget	Positive (Negative)	FYTD Actual	FY26 FYTD Budget	Positive (Negative)	Percentage Remaining
Revenues:								
Revenue Fines	2,000	100	167	(67)	850	1,000	(150)	57.5%
New Driver Permit Revenue	1,125	225	94	131	1,125	563	563	0.0%
Taxi Business Permit	115,200	8,100	9,600	(1,500)	41,900	57,600	(15,700)	63.6%
Driver Transfer Revenue	125	50	10	40	1,050	63	988	-740.0%
Driver Renewal Revenue	2,975	50	248	(198)	1,125	1,488	(363)	62.2%
Vehicle Transfer Revenue	-	-	-	-	638	-	638	0%
Vehicle Permit Revenue	101,000	7,399	8,417	(1,018)	53,549	50,500	3,049	47.0%
Operator Application Fee	2,000	-	167	(167)	-	1,000	(1,000)	100.0%
Total Revenue	224,425	15,924	18,702	(2,778)	100,237	112,213	(11,976)	-10.7%
Expenses:								
Salaries and Wages	92,530	4,065	7,711	3,646	34,190	46,265	12,075	63.0%
Fringe Benefits	64,968	3,030	5,414	2,384	26,748	32,484	5,736	58.8%
Services	36,475	7,580	3,040	(4,540)	33,106	18,238	(14,869)	9.2%
Supplies and Materials	19,302	-	1,609	1,609	5,291	9,651	4,360	72.6%
Taxes and Fees	50	-	4	4	-	25	25	100.0%
Miscellaneous	11,100	64	925	861	2,593	5,550	2,957	76.6%
Total Expenses	224,425	14,739	18,702	3,963	101,929	112,213	10,284	9.2%
Total Operating Surplus (Deficit)	\$ -	\$ 1,185			\$ (1,692)			

Revenue

- Revenues are below budget primarily due to a decrease in taxi business permit revenue resulting from one taxi operator closing operation:
- As of FYTD26, there is a decrease of 4,170 taxi trips compared to FYTD25.

Taxi Trips

	FY25-December	FY26-December	Variance	%Δ
Trips	8,443	7,889	(554)	-6.6%

Taxi Trips

	FYTD-FY25	FYTD-FY26	Variance	%Δ
Trips	44,026	39,856	(4,170)	-9.5%

Salaries and Wages

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

Fringe Benefits

- Fringe benefit expenses are within an acceptable range of the budget

Services

- The unfavorable balance in services is primarily attributed to an increase in legal expenses

Supplies and Materials

- Supplies and materials expenses are within an acceptable range of the budget

Taxes and Fees

- Taxes and fee expenses are within an acceptable range of the budget

Miscellaneous

- Miscellaneous expenses are within an acceptable range of the budget



SunLine Services Group

Item 8M

Board Report

February 25, 2026

AGENDA ITEM: ACTION - CONSENT CALENDAR

TO: Taxi Committee/Committee of the Whole
Board of Directors

FROM: Jill Plaza, Taxi/Contracted Transportation Services Administrator

SUBJECT: Acceptance of Taxi Trip Data – December 2025

Recommendation:

Recommend that the Board of Directors approve the taxi trip data for December 2025.

Background:

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 December, there were 554 fewer taxi trips in December 2025 serviced by four (4) more cabs when compared to December 2024 (79 cabs in 2025 compared to 75 cabs in 2024).

There were 4,170 fewer taxi trips for FYTD26 compared to FYTD25.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

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.

In Collaboration with:

N/A

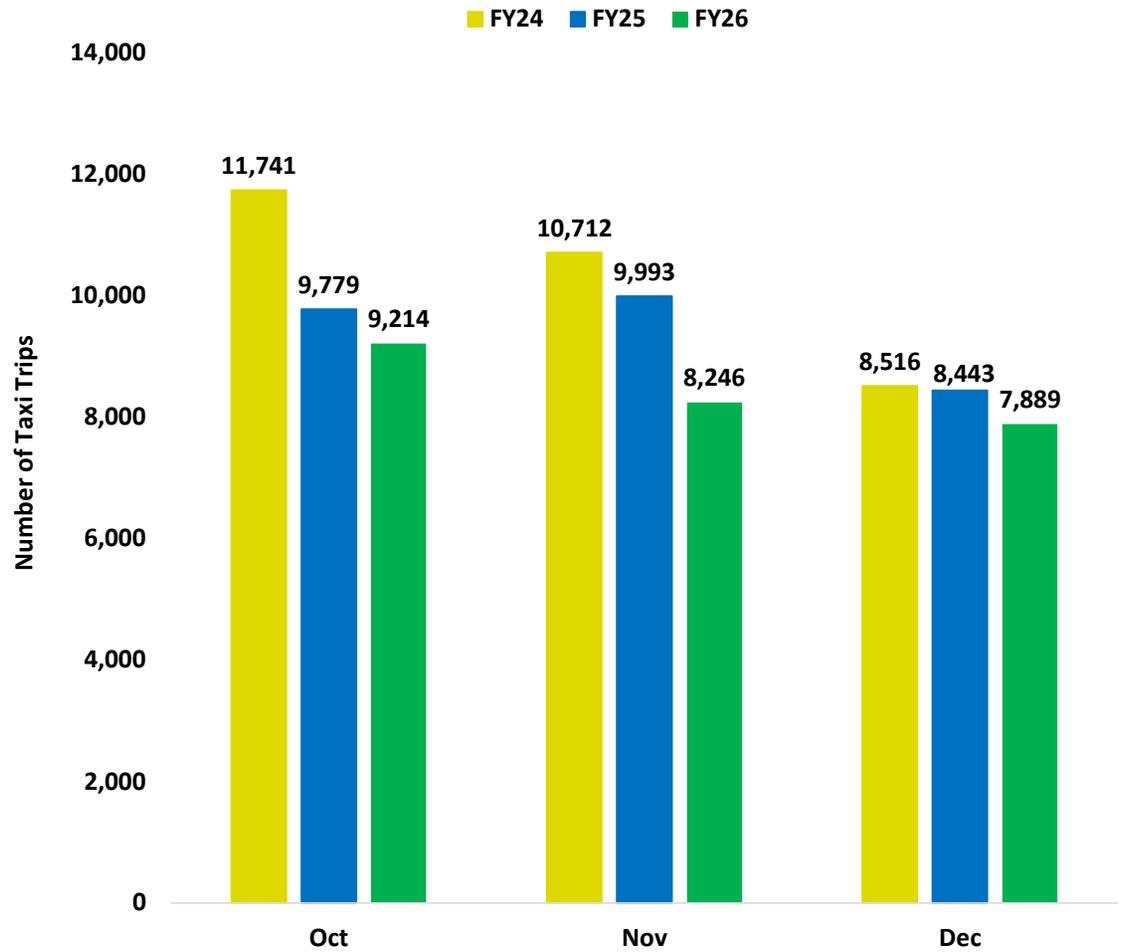
Approved/Reviewed by:

Mona Babauta, CEO/General Manager
Catherine J. Groves, General Counsel
Greg Wildman, Chief of Strategic Alignment

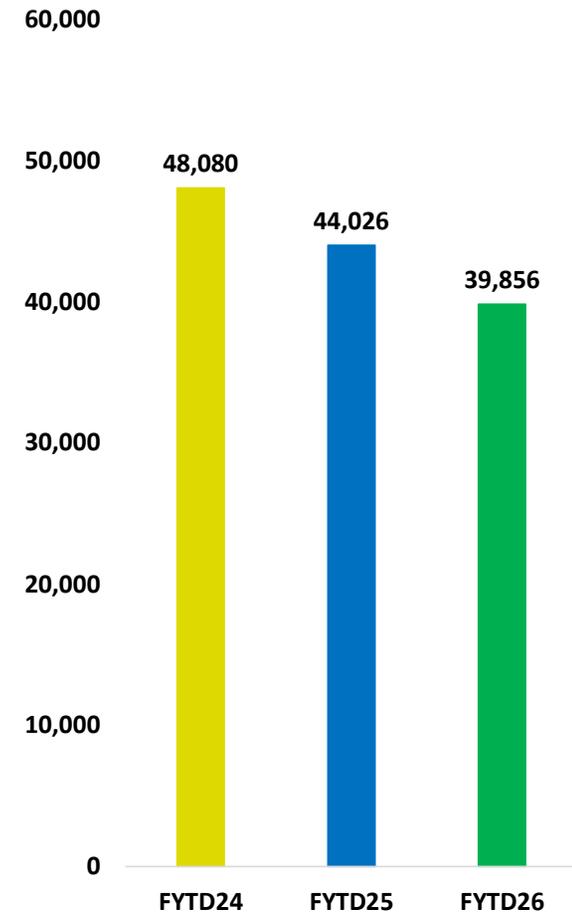
Attachments:

- December 2025 Taxi Trip Data Chart

Taxi Trip Three (3) Month Comparison as of December 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 FY24, FY25, and FY26.



Board Report

AGENDA ITEM: DISCUSSION
TO: Board of Directors
FROM: Edith Hernandez, Director of Board and External Affairs
SUBJECT: Legislative Update for February 2026

Recommendation:

Recommend that the Board of Directors (Board) receive and discuss the February 2026 Legislative Update.

Background:

State Update

The Legislature reconvened on January 5 for the second year of the 2025–26 Session and has introduced approximately 600 bills, with additional measures expected before the February 20 deadline. The Governor released the proposed Fiscal Year (FY) 2026–27 State Budget on January 9, and legislative subcommittee hearings are currently underway. The May Revision is anticipated in mid-May, with the final budget constitutionally required to be adopted by June 15.

At the program level, The California Department of Transportation (Caltrans) released draft FY 2025–26 Low Carbon Transit Operations Program (LCTOP) guidelines on January 26, initiating a public comment period through February 26. Applications are expected in late April or early May, with approvals anticipated in September. Total program funding for FY 2025–26 has not yet been announced; by comparison, the FY 2024–25 program provided approximately \$202 million statewide.

Similarly, the California State Transportation Agency (CalSTA) released draft guidelines and a schedule for Transit and Intercity Rail Capital Program (TIRCP) Cycle 8, which is expected

to make approximately \$900 million available statewide. Applications are due May 14, 2026, with awards anticipated September 18, 2026. SunLine staff are coordinating with consultants to evaluate a potential application. Concurrently, the California Transit Association (CTA) is advocating additional flexibility in TIRCP guidelines, including expanded eligibility for zero-emission bus maintenance facilities and fleet replacement projects.

Caltrans has also announced several organizational updates, including the creation of a Deputy Director for Transit and Rail Programs, restoration of the Division of Mass Transportation, release of a Director's Policy on Transit, and establishment of the California Transit Advisory Committee. Collectively, these actions elevate the role of transit within statewide transportation planning and may strengthen coordination and opportunities for agencies pursuing transit-priority investments.

Bills of Interest:

AB 1837 (Mark González) – Forward-Facing Camera Reauthorization – Support

Extends authorization for automated bus lane enforcement cameras beyond 2027.

AB 1944 (Lee) – Zero-Emission Bus Axle Weight Limits – Support

Adjusts axle weight timelines to assist transit agencies complying with CARB's Innovative Clean Transit regulation.

AB 1198 (Haney) – Prevailing Wage – Watch

Requires biannual prevailing wage adjustments on public works contracts.

AB 1421 (Wilson) – Road Usage Charge Study – Watch

Requires consolidated reporting and recommendations regarding a mileage-based road user charge.

AB 1599 (Ahrens) – California Transit Stop Registry – Watch

Creates a statewide standardized transit stop database.

Federal Update

Congress enacted the Consolidated Appropriations Act, 2026 (H.R. 7148) on February 3, fully funding the Transportation–HUD (THUD) account for the remainder of FY 2026 and providing stability for federal transit formula and discretionary programs. While the Department of Homeland Security is currently funded under a short-term continuing resolution through February 13, 2026, transit funding administered through the U.S. Department of Transportation is not expected to be affected. With federal funding levels

now confirmed, attention has shifted toward program implementation and upcoming discretionary opportunities.

The Federal Transit Administration (FTA) is advancing FY 2026 program rollout and is expected to release Notices of Funding Opportunity later this year for the Low or No Emission Bus Program and the Bus Facilities Program. In November 2025, FTA awarded approximately \$2.03 billion nationwide under the FY 2025 versions of these programs, demonstrating continued federal investment in transit modernization.

The FY26 Better Utilizing Investments to Leverage Development (BUILD) discretionary grant program is currently open, with applications due February 24, 2026. The program provides \$1.5 billion in available funding, with awards capped at \$25 million per project and selections anticipated by late June 2026. Concurrently, Congress has begun early hearings related to the next surface transportation research, autonomous vehicle policy frameworks and infrastructure cybersecurity, with discussions expected to continue throughout the year. In coordination with federal advocates, SunLine's priorities including hydrogen initiatives, zero-emission technology, and maintenance facility development are positioned within these ongoing policy conversations.

Federal engagement efforts continue to support these priorities. On February 2-3, Smith Garson Senior Counsel Ben Odendahl visited SunLine's Thousand Palms facility to review hydrogen operations, maintenance facility planning, and key regulatory topics. Looking ahead, SunLine's Washington, D.C. advocacy trip is scheduled for early April to align with FY 2026 earmark discussions and reinforce the agency's priorities with federal partners.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

Shaw Yoder Antwih Schmelzer & Lange (SYASL), State Advocate
Smith Garson, Federal Advocate

Approved/Reviewed by:

Mona Babauta, CEO/General Manager

Attachments:

- [Item 8N1](#) - Shaw Yoder Antwih Schmelzer & Lange State Legislative Update – February 2026
- [Item 8N2](#) - Smith Garson Federal Legislative Update – February 2026



1415 L Street
Suite 1000
Sacramento
CA, 95814
916-446-4656

February 13, 2026

TO: Board of Directors
SunLine Transit Agency

FM: Matt Robinson, Michael Pimentel & Brendan Repicky
Shaw Yoder Antwih Schmelzer & Lange

RE: **STATE LEGISLATIVE UPDATE – February 2026**

General Update

In Sacramento, the second year of the 2025-26 Legislative Session is in full swing. Following the release of the Governor's proposed FY 2026-27 budget on January 9, the Department of Finance subsequently published a number of budget trailer bills (policy bills to implement the Governor's budget). Over the coming months, the Assembly and Senate's respective budget committees and subcommittees will meet frequently regarding the Governor's proposed budget. In mid-May, the Governor will release his "May Revise," an update to his January proposed budget. This will kick off final negotiations between the Governor, Senate, and Assembly to finalize the budget agreement. The Budget Bill must be passed by June 15, in advance of the new fiscal year, which begins on July 1.

Meanwhile, since the Legislature reconvened on January 5, approximately 600 new bills have been introduced. We expect around 1,000 additional bills to be introduced before the bill introduction deadline on February 20. Many of these bills will start out as "spot" bills and will need to be amended before they can be heard in the Legislature's policy committees. The Assembly requires spot bills to be amended by March 16 and the Senate by March 25. Also, bills must be in print for 30 days before they may be heard in a policy committee.

The Legislature will break for Spring Recess from March 26 and return on April 6. When they reconvene, they will have until April 24 to finish policy committee hearings for bills in the first house.

For information about key legislative and budget deadlines for next year, please see the 2026 Legislative Calendar [here](#).

Caltrans Releases Draft Guidelines for LCTOP

On January 26, the California Department of Transportation (Caltrans) released the [FY 2025-26 Low Carbon Transit Operations Program Draft Guidelines](#) for public review.

The public comment period is now open and will run from January 26 to February 26. During this time, Caltrans encourages transit agencies to share feedback and suggestions on the draft guidelines. Further dates have not yet been finalized, but we expect funding requests to be due in late April or early May, with approvals in September. The total funding amount for FY 2025-26 has not yet been released, but the FY 2024-25 LCTOP distributed \$202 million.

Caltrans Releases Director’s Policy on Transit and Major Organizational Changes

On February 9, Caltrans announced the establishment of a new Deputy Director for Transit and Rail Programs, the restoration of the Division of Mass Transportation to create a dedicated team focused on transit issues, the release of the [Director's Policy on Transit](#) to support more coordinated and efficient transit and rail services along the State Highway System, and the creation of a new California Transit Advisory Committee (CALTAC).

The Director's Policy focuses on transit priority facilities such as dedicated bus lanes, signal priority, and other infrastructure to make road-based transit service faster and more reliable on the State Highway System. The CALTAC will consist of 20 member agencies and organizations from a diverse group of transit stakeholders, such as transit agencies, state universities, disadvantaged communities, and transit experts.

TIRCP Cycle 8

As we have previously reported, the California State Transportation Agency (CalSTA) released the draft [guidelines](#) and schedule for the Transit and Intercity Rail Capital Program (TIRCP) Cycle 8. The TIRCP is a competitive grant program which, since its inception in 2015, has funded over \$11 billion worth of transformative capital projects across California. See the draft schedule below. CalSTA expects approximately \$900 to be available for Cycle 8.

2026 TIRCP Cycle 8 Draft Schedule

- ~~Release Draft 2026 Cycle Guidelines~~ ~~January 12, 2026~~
- ~~Guidelines Workshops (Virtual)~~ ~~February 11, 2026~~
- Closing Date for Comments on Draft Guidelines February 18, 2026
- CalSTA Publishes Final Cycle 8 Guidelines February 20, 2026
- CalSTA Publishes Cycle 8 Call for Projects February 20, 2026
- Optional meetings with applicants* March 2 – March 13, 2026
- Project Applications Due May 14, 2026
- CalSTA Anticipated Award Announcements September 18, 2026

The California Transit Association (the trade association to which SunLine belongs) plans to submit comments to CalSTA requesting changes to their draft guidelines to better support transit agencies, including asks to allow the funding of projects which have a secondary, but perhaps a vital, nexus to greenhouse gas reductions (like a maintenance or operations facility for zero-emission buses), to permit TIRCP funding for vehicle fleet replacements without additional ridership gains, and to allow flexibility to use TIRCP to fund priority projects currently stalled due to insufficient funding, among other requests.

SunLine staff have begun to work with our team to strategize on a potential TIRCP application.

Bills of Interest

AB 1198 (Haney) Prevailing Wage – WATCH

This bill impacts public works contracts by requiring that any change in prevailing wage rates be applied biannually to *all* public works contracts awarded, until the projects' completion, as determined by the Director of Industrial Relations. The bill also allows contractors, awarding bodies, or their representatives to file a verified petition within 20 days to review a rate determination. The Director must then investigate or hold a hearing and issue a final determination within 20 days, which is sent to the awarding body and interested parties. ***In the Assembly, pending referral to policy committee.***

AB 1421 (Wilson) Vehicles: Road Usage Charge Technical Advisory Committee – WATCH

This bill would require the California Transportation Commission, in consultation with the California State Transportation Agency, to consolidate and prepare research and recommendations related to a road user charge or a mileage-based fee system. This bill would require the commission to submit a report to the Legislature on the research and recommendations by no later than January 1, 2027. ***In the Senate, pending referral to policy committee.***

AB 1599 (Ahrens) California Transit Stop Registry – WATCH

This bill would require the Department of Transportation to create the California Transit Stop Registry as a centralized, statewide dataset of standardized information regarding transit stops by December 31, 2026. Additionally, this bill would require all transit operators that qualify for the funding under the Mills-Alquist-Deddeh Act to ensure that the name, location, of each of their transit stops are accurately reflected in the California Transit Stop Registry. ***In the Assembly Transportation Committee.***

AB 1837 (Mark Gonzalez) Forward Facing Camera Reauthorization – RECOMMEND SUPPORT

Sponsored by the California Transit Association, this bill would extend the existing authorization for transit agencies to install forward-facing automated parking cameras to combat the issue of cars parked in bus lanes and help ensure transit reliability. This authorization – originally enacted in 2022 – is set to expire on January 1, 2027. ***In the Assembly, pending referral to policy committee.***

AB 1944 (Lee) Zero-Emission Bus Axle Weight Limit – RECOMMEND SUPPORT

Also sponsored by the California Transit Association, this bill would amend the axle weight limits that apply to zero-emission buses purchased by California transit agencies by postponing the dates by which certain axle weight limits apply. This proposal would provide for a near-term increase in axle weight limits to help facilitate continued compliance with the California Air Resources Board's Innovative Clean Transit (ICT) regulation. ***In the Assembly, pending referral to policy committee.***

For a full list of bills we are tracking for SunLine, please click [here](#).

February 12, 2026

TO: Board of Directors - SunLine Transit Agency

FM: Smith Garson

RE: Federal Legislative and Regulatory Update – February 2026

General Update

Congress used early February to complete most of the Fiscal Year 2026 (FY26) appropriations cycle and bring a short partial shutdown to an end. The Consolidated Appropriations Act, 2026 (H.R. 7148) was enacted on February 3, funding the majority of federal agencies for the remainder of FY26, including the Transportation, Housing and Urban Development (THUD) account.

The Department of Homeland Security (DHS) remains funded only through February 13, 2026 under a short-term continuing resolution, leaving a near-term funding deadline that could result in another temporary disruption if negotiations stall.

With THUD funding enacted, the federal transit funding environment is more stable for the remainder of FY26. Attention is now shifting from appropriations uncertainty toward program implementation and upcoming discretionary grant opportunities.

White House Update

President Trump signed H.R. 7148 into law, formally ending the partial shutdown and finalizing FY26 funding for most major departments, including the U.S. Department of Transportation.

The Administration continues negotiations with congressional leaders regarding full-year DHS funding. While these negotiations are largely centered on immigration policy conditions, any lapse could affect broader federal operations.

The Administration has also continued advancing infrastructure-relevant priorities, including critical infrastructure cybersecurity initiatives and implementation of recently finalized clean energy tax guidance. These policy efforts may shape future federal infrastructure and resilience criteria but do not alter current FY26 transit funding.

Congressional Activity

Congressional activity this month has focused primarily on finalizing FY26 appropriations and addressing DHS funding.

H.R. 7148 enacted five of the remaining FY26 appropriations bills, including Transportation-HUD. The separate DHS appropriations measure (H.R. 7147) remains under consideration in the Senate, with procedural steps taken but no final agreement reached as of this writing.

Beyond appropriations, Congressional committees have resumed oversight and policy discussions related to surface transportation research, autonomous vehicle frameworks, and critical infrastructure cybersecurity. These early hearings signal the beginning of broader transportation policy discussions that could inform future surface transportation reauthorization efforts.

Federal Agencies and FY26 Funding

With THUD funding enacted, agencies within the U.S. Department of Transportation are operating under full-year FY26 appropriations authority. This reduces uncertainty surrounding formula programs and discretionary transit funding compared to the continuing resolution period.

Congressional Democrats and the White House have spent the last two weeks negotiating potential reforms to Immigration & Customs Enforcement (ICE) operations in response to the two killings of U.S. citizens in Minnesota last month. The lack of trust between the two sides has caused the negotiations to progress very slowly. As the February 13, funding deadline approaches the lack of consensus between Congressional Democrats and the White House and the upcoming President's Day recess indicates DHS may shut down for at least a week. Since ICE and Customs and Border Protection (CBP) received significant amounts of new funding the One Big Beautiful Bill over the summer, any shutdown of DHS will have the biggest impact on agencies like the Transportation Security Administration (TSA), Federal Emergency Management Agency (FEMA), and the U.S. Coast Guard.

Federal Transit Administration (FTA) Programs

FTA's most recent competitive bus program milestone remains the FY25 Bus and Bus Facilities and Low or No Emission Vehicle (Low-No) awards. On November 20, 2025, FTA announced approximately \$2.03 billion in awards supporting 165 projects nationwide, including \$1.63 billion under Low-No and \$397.7 million under the Bus Competitive program.

With FY26 appropriations enacted, FTA is expected to release FY26 Notices of Funding Opportunity for the Low-No and Bus and Bus Facilities programs later this year.

Discretionary Grant Opportunity: FY26 BUILD (formerly RAISE)

The U.S. Department of Transportation's FY26 BUILD Notice of Funding Opportunity (Funding Opportunity Number DTOS59-26-RA-BUILD) is currently open.

The application deadline is February 24, 2026, with estimated total program funding of \$1.5 billion and an award ceiling of \$25 million per project. Applications submitted after 5:00 p.m.

Eastern on February 24 will be marked late and ineligible. Selections are expected no later than June 28, 2026.

SunLine Federal Engagement Update

Smith Garson continues regular engagement with SunLine’s federal delegation and monitors developments affecting transit, clean energy, and discretionary funding opportunities.

On February 2nd and 3rd, Ben Odendahl, Senior Counsel at Smith Garson, visited the SunLine facility in Thousand Palms. During the visit, Mr. Odendahl was given a tour of SunLine’s hydrogen production and fueling facilities as well as the current maintenance facility. As part of the site visit, Mr. Odendahl met with several senior staff members at SunLine, including Mona Babauta, Luis Garcia, and Walter Watcher. During these meetings, the SunLine team identified a handful of federal policy issues that are relevant to SunLine’s operations. Mr. Garcia specifically identified the Spare Ratio rule and the “Under the Hood” training requirement. Mr. Garcia noted there is currently an exemption in place for the “Under the Hood” training requirement, but once that exemption expires SunLine could face more cost associated with driver training and less applicant pool for drivers. The American Public Transit Association (APTA) is already advocating for reforms to both the Spare Ratio rule and the “under the Hood” training requirement. Mr. Odendahl said this is good timing because Congress will take on surface transportation reauthorization over the course of 2026.

Discussions also centered around potential funding opportunities SunLine could pursue for its new maintenance facility. Mr. Odendahl offered to help SunLine navigate both the Congressional earmark process and potential grant openings. At the end of the visit, Ms. Babauta asked about timing for senior SunLine personnel to fly to Washington DC for meetings with federal policymakers. This fly-in is scheduled for the beginning of April to coincide with earmark requests.

Current priorities include:

- Monitoring implementation of FY26 Transportation-HUD appropriations;
- Tracking anticipated FY26 FTA Low-No and Bus Competitive solicitations;
- Assessing near-term discretionary opportunities;
- Prepare and submit earmark requests to SunLine’s Congressional delegation;
- Determining the viability of SunLine’s eligibility for the Economic Development Administration (EDA) Disaster Supplemental Funding Opportunity and evaluating alignment with regional economic resilience criteria;
- Planning Congressional and agency meetings for SunLine’s D.C. Fly-in in early April;
- Advancing SunLine’s policy priorities in the upcoming surface transportation reauthorization.



Board Report

AGENDA ITEM: ACTION

TO: Finance/Audit Committee/Committee of the Whole
Board of Directors

FROM: Walter Watcher, Chief of Capital Projects

SUBJECT: Change Order to Add Additional Compensation to Agreement 25-003
Security Fence Upgrade with Three Peaks Corp.

Recommendation:

Recommend that the Board of Directors (Board) delegate authority to the CEO/General Manager, or designee, to issue a change order for agreement 25-003 with Three Peaks Corp. for the Security Fence Upgrade Project to increase the not-to-exceed amount of \$542,150 by \$240,382 for a new total not-to-exceed amount of \$782,532.00.

Background:

On March 22, 2025, SunLine Transit Agency (SunLine) submitted design plans for Security Fence Upgrades at the Thousand Palms facility to the Riverside County Fire Marshal for review. The plans were approved on April 5, 2025. Based on the approved design, staff issued an Invitation for Bids. Bids were received on July 10, 2025, and Three Peaks Corp. was identified as the lowest, responsive and responsible bidder.

On August 7, 2025, the Board delegated authority to the CEO/General Manager, or designee, to negotiate and execute a contract with Three Peaks Corp. for the Security Fence Project for a total not-to-exceed project amount of \$542,150.

On September 5, 2025, the Riverside County Fire Marshal's Office rescinded its initial approval of the gate design and issued a notice requiring corrections. SunLine submitted revised design plans, which were later approved. The revised plans call for increasing the

width of the North entrance by six (6) feet, including a wider driveway apron, a new curb return, larger entrance and exit gates, and a wider drive aisle. This expanded entrance will support SunLine's planned Workforce Training Center and future development to the north of the site, while improving bus maneuverability and ensuring adequate access for fire apparatus during emergency response.

Staff, in coordination with the engineering firm, reviewed the labor and material costs submitted by Three Peaks Corp. for the additional work and determined that the pricing was fair and reasonable. Further analysis found that the proposed costs are also consistent with the pricing structure in the originally awarded bid.

Financial Impact:

The \$240,382 financial impact will be covered by State Transit Assistance (STA), FTA Transit Administration (FTA) 5307 and State of Good Repair funds. These funding sources are in the Board-approved capital budget.

Strategic Priority:

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.

In Collaboration with:

Bryan Valenzuela, Chief Safety Officer
Isabel Vizcarra, Chief Transportation Officer
Mark Perry, Chief Maintenance Officer

Approved/Reviewed by:

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

Attachments:

None.



SunLine Transit Agency

Item 10

February 25, 2026

Board Report

AGENDA ITEM: ACTION

TO: Finance/Audit Committee/Committee of the Whole
Board of Directors

FROM: Walter Watcher, Chief of Capital Projects

SUBJECT: Award of Contract 25-006 for Asphalt Concrete Pavement Upgrade Project

Recommendation:

Recommend that the Board of Directors (Board) delegate authority to the CEO/General Manager, or designee, to execute an agreement with Vance Corporation (Vance) for the Asphalt Concrete Pavement Upgrade Project (Project) in the amount of \$1,936,169.40 and authorize a ten-percent contingency of \$193,617 for a total not-to-exceed project amount of \$2,129,786.40

Background:

The existing pavement within SunLine Transit Agency's (SunLine) operations and maintenance areas has deteriorated significantly over time, showing widespread cracking and surface failures that could soon affect daily operations. This Project will remove and replace approximately 165,000 square feet of asphalt and install 7,000 square feet of high-strength concrete in heavy traffic and turn areas. These improvements are critical to maintaining the long-term resiliency of the Thousand Palms campus, while reducing wear on vehicles and mitigating potential operational delays.

On October 14, 2025, staff issued an Invitation for Bid (IFB) for the Project. The IFB was publicly advertised in a newspaper of general circulation and was posted on SunLine's website. The IFB required bidders to provide pricing for the base work as well as Alternatives A1 and A2. Alternative A1 consisted of a six-inch deep layer of asphalt. Alternative A2 consisted of a four-inch deep layer of asphalt. Pursuant to Public Contract Code section

20103.8, the IFB provided that bids would be evaluated based on the Total Firm Fixed Price (Base bid plus Alternative A1 and Alternative A2). Section 20103.8 provides that local agencies may add to or deduct from the contract any of the additive or deductive items after the lowest responsible bidder has been determined.

On January 22, 2026, SunLine received bids from seven (7) contractors.

In accordance with the IFB, the lowest, responsive, and responsible bidder was determined to be Vance. Due to project needs and available funding, staff recommends awarding a contract to Vance for the Base bid (\$696,816.40) and Alternative A1 (\$1,239,353.00) for a combined total not-to-exceed price of \$1,936,169.40. The price is found to be fair and reasonable based on the number of bids received under full and open competition.

In addition to the bid amount, staff also recommends that the Board authorize a ten-percent contingency of \$193,617 to be utilized in the event of unforeseen circumstances. Such use would be subject to a future change order or amendment to the proposed contract, if necessary.

Financial Impact:

The financial impact of \$2,129,786.40 will be covered by Federal Transit Agency (FTA) 5307 funds and State Transit Assistance (STA) funds. These funding sources are included in the Board-approved capital budget, and additional action on the project budget is needed at this time.

Strategic Priority:

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.

In Collaboration with:

Isabel Vizcarra, Chief Transportation Officer

Mark Perry, Chief Maintenance Officer

Bryan Valezuela, Chief Safety Officer

Approved/Reviewed by:

Mona Babauta, CEO/General Manager

Catherine J. Groves, General Counsel

Luis Garcia, Chief Financial Officer

Attachments:

- [Item 10a](#) – Price Analysis
- [Item 10b](#) – Solicitation List



INVITATION FOR BID
D1 ASPHALT CONCRETE PAVEMENT UPGRADE
25-006

PRICE ANALYSIS

Lowest Responsive Responsible Bidder Determination

	Vance Corporation	Narrow Path Engineering Inc.	Granite Construction Company	Mendoza Engineering Company, Inc.* <i>Non-responsive</i>	PaveWest LLC	Romero General Construction Corp.	NPG, Inc.
Base Bid	\$ 696,816.40	\$ 875,537.64	\$ 1,190,972.30	\$ 375,174.70	\$ 709,840.68	\$ 941,805.45	\$ 543,136.00
Alternate A1 - 6"	\$ 1,239,353.00	\$ 1,146,925.30	\$ 1,004,620.70	\$ 1,519,015.05	\$ 1,414,881.80	\$ 1,271,996.00	\$ 1,552,401.45
Alternate A2 - 4"	\$ 882,780.50	\$ 826,172.25	\$ 678,988.10	\$ 1,103,374.25	\$ 882,672.35	\$ 879,198.55	\$ 1,124,744.25
Contract Award (Base + Alternate A1)	\$ 1,936,169.40	\$ 2,022,462.94	\$ 2,195,593.00	\$ 1,894,189.75	\$ 2,124,722.48	\$ 2,213,801.45	\$ 2,095,537.45
Total Firm Fixed Price (Base + Alternative A1 + Alternative A2)	\$ 2,818,949.90	\$ 2,848,635.19	\$ 2,874,581.10	\$ 2,997,564.00	\$ 3,007,394.83	\$ 3,093,000.00	\$ 3,220,281.70

	Difference	Delta
Difference between Vance Corporation and Narrow Path Engineering Inc. bids	\$ (29,685.29)	-1.05%
Difference between Vance Corporation and NPG, Inc. bids	\$ (401,331.80)	-14.24%

Seven (7) firms submitted bids for the Asphalt Concrete Pavement Upgrade project. Pursuant to Public Contract Code § 20103.8, the IFB stated that bids would be evaluated based on the Total Firm Fixed Price (Base + Alternative A1 + Alternative A2). In accordance with the IFB, the lowest, responsive, and responsible bidder was determined to be Vance Corporation (Vance). Section 20103.8 provides that local agencies may add to or deduct from the contract any of the additive or deductive items after the lowest responsible bidder has been determined. Staff has completed standard responsiveness and responsibility checks consistent with this determination. *Mendoza Engineering Company, Inc.'s bid submission was found non-responsive.

Prepared by:

Alfred Valrie Jr.
Contracts Administrator
11-Feb-26

PLANETBID SOLICITATION LIST IFB 25-006 ASPHALT CONCRETE PAVEMENT UPGRADE

Company Name	Address	City	State	Zip	Contact Name	Email
All American Asphalt	400 East Sixth Street	Corona	California	92879	Edward J Carlson	publicworks@allamericanasphalt.com
ALL AMERICAN BUILDING SERVICES	PO Box 802586 3234226013	Santa Clarita	California	91380	ANTHONY INNABI	Bids@allamericanrebuild.com
Allied Solutions	300 Veterans Way	Carmel	Indiana	46032	Jason Collier	contracts@alliedsolutionenterprise.com
California Professional Engineering, Inc.	19062 San Jose Ave	La Puente	California	91748	Van Nguyen	estimating@cpengineeringinc.com
Cat Tracking Inc.	17 Commercial Avenue	Riverside	California	92507	Arthur Garratt	estimating@cattrackinginc.com
Certerra-RMA Group	12130 Santa Margarita Ct	Rancho Cucamonga	California	91730	Raymond Alcantara	ralcantara@rmacompanies.com
Chrisp Company	2280 S Lilac Ave	Bloomington	California	92316	Panda Oesterblad	poesterblad@chrispco.com
CMG Alliance	4424 Foxrun Dr.	Chino Hills	California	91709	Bret McCauley	bret.mccauley@cmgalliance.com
CMIP LLC	190 Sierra Ct Ste B113	Palmdale	California	93550	Valentine Dos Santos	bids.cmip@gmail.com
DT Stellar General Engineering	31941 Silk vine drive	winchester	California	92596	jonathon sedeno	jседeno@dtstellargeneral.com
G3 Quality, Inc.	13850 Cerritos Corporate Drive Suite E	Cerritos	California	90703	Jessica Corson	bd@g3quality.com
GovData Consulting LLC	123 Business Ave	San Diego	California	92101	John Smith	smqvayv@sharkslasers.com
Granite Construction Company	38000 Monroe Street	Indio	California	92203	Joe Richardson	DCR.estimating@gcinc.com
KNC CONSTRUCTION INC	12277 APPLE VALLEY RD 144	APPLE VALLEY	California	92308	MIKE PHINNEY	mike@kncinc.net
LCR Earthwork & Engineering, Corp	7251 Jurupa Rd	Jurupa Valley	California	92509	Jorge Mendoza	lcr@lcrearthworkengineering.com
LOGO'S ENGINEERING,INC	1019 Vallejo St	Perris	California	92571	Richard A	ralarcon.logos@gmail.com
Match Corporation	1596 Harry Sheppard Blvd.	San Bernardino	California	92408	Jason G. Jones	jjones@matchcorp.com
MCC Concrete Construction Inc	P.O. Box 910	Thousand Palms	California	92276	Denisse Rocha	denisse@mascorroconcrete.com
Mendoza Engineering Company, Inc	8368 Cottonwood Ave	Fontana	California	92335	Dalila Soto	dsoto@mendozaengineeringco.com
Mission Paving and Sealing, Inc.	12747 Schabarum Avenue	Irwindale	California	91706	Mike Miller	estimating@missionpaving.com
MZB Engineering Inc	1192 Athlone Ln	Corona	California	92882	Sheraz Gondal	sheraz.gondal@mzbinc.com
MZB Engineering Inc	518 Queensland Cir #102	Corona	California	92879	Humayun Aziz	info@mzbinc.com
Narrow Path Engineering Inc.	1198 Brookmeade Cir	Beaumont	California	92223	Tony Veltre	info@narrowpathengineering.com
NPG, Inc.	1354 Jet Way	Perris	California	92571	Jeffrey Nelson	cstone@npgasphalt.com
ONYX PAVING COMPANY INC	22707 LA PALMA AVE	YORBA LINDA	California	92887	COREY R. KIRSCHNER	bids@onyxpaving.com
Pavement Recycling Systems	10240 San Sevaine Way	Jurupa Valley	California	91752	Trisha Vander Sluis	estimating1@pavementrecycling.com
PaveWest, LLC	11700 166th Street	Artesia	California	90701	Pauline Duval	pauline@pavewest.com
R.J. NOBLE COMPANY	15505 E. Lincoln Ave	Orange	California	92865	Jennifer De longh	jenniferdeiongh@rjnoblecompany.com
Road Works Inc	303 Short Street	Pomona	California	91768	Michael B	rw bids@roadworks.net
Rogue Electric	29094 JAMESONITE CIR	Menifee	California	92584	ERICK COOPER	ecooper@rogueelectric.net
ROMERO GENERAL CONSTRUCTION CORP.	2150 N. Centre City Parkway Suite I	Escondido	California	92026	David Donnelly	lulloa@romerogc.com
RTC, Inc.	22431 Antonio Pkwy B160-251	Rancho Santa Margarita	California	92688	Amanda	amanda@rtcstormwater.com
RUSTY BUCKET CONSTRUCTION LLC	614 E Ovington St. Lancaster	St. Lancaster	California	93535	Neymar Deldago	bidding@rusty-b.com
SAS Constructions	301 West Dyer Rd Unit D	Santa Ana	California	92707	Ali Shahabi	Info@SASConstructions.com
Sunline Transit Agency	32505 Harry Oliver Train	Thousand Palms	California	92240	Charlotte Clement	cclement@sunline.org
Superior Paving Company DBA United Paving Co	1881 North Delilah Street	Corona	California	92879	Enrique Partida	enrique@united-paving.com
SWCA	320 N Halstead St Suite 120	Pasadena	California	91107	Elaine Parraga	psmktg@swca.com
Three Peaks Corp.	PO BOX 101	Calimesa	California	92320	Erik Simmons	erik@threepeakscorp.com
Tri-Star Contracting II, Inc.	15501 Little Morongo Rd	Desert Hot Springs	California	92240	Jordan Willis Rodriguez	jwillis@tri-star.info
Tri-Star Contracting II, Inc.	15501 Little Morongo Road	Desert Hot Springs	California	92240	Rodney Owens	Rowens@tri-star.info
TVR Construction Engineering LLC	4230 Michael st 7149276664	Riverside	California	92507	Gergis Bebawy	GERGISK@GMAIL.COM
Universal Construction and Engineering	77725 Enfield Ln. Ste. 210	Palm Desert	California	92211	Joanna Montes	joanna@universalconstructioneng.com
Van Engineering inc	36520 Villa del sol	wildomar	California	92595	Sara sanders	accounting@van-inc.com
Vance Corporation	459 Egan Avenue P.O. Box 575	Beaumont	California	92223	Richard Kesner	BIDS@vancecorp.net

Footnote: Bold font indicates companies that submitted bids



Board Report

AGENDA ITEM: RECEIVE & FILE

TO: Strategic Planning & Operational Committee/Committee of the Whole Board of Directors

FROM: Greg Wildman, Chief of Strategic Alignment

SUBJECT: Workforce Training Center Facility Equity Analysis

Recommendation:

Recommend that the Board of Directors (Board) receive and file the Workforce Training Center Facility Equity Analysis.

Background:

As a recipient of federal financial assistance from the Federal Transit Administration (FTA), SunLine Transit Agency (SunLine) is required to perform an equity analysis for certain proposed facilities to ensure the location of the facility is selected without regard to race, color, or national origin, in accordance with Title VI of the Civil Rights Act (Title VI), the U.S. Department of Transportation's Title VI regulations (49 CFR Part 21), and FTA Circular 4702.1B. A Title VI facility equity analysis compares the equity impacts of various location alternatives for the proposed facility, and it must be conducted during the project's planning stage, before the selection of the preferred site. Public outreach to people potentially impacted by the siting of the facility must be conducted and considered in the analysis.

SunLine plans to construct an 8,500 square-foot, state-of-the-art Workforce Training Center to provide essential training for current and future transit professionals, emphasizing the skills necessary to operate and maintain zero emission vehicle technology. Designed to enhance learning and practical application, the proposed facility features a heightened drive-through training maintenance bay with a mezzanine mechanic platform for accessibility of upper areas of stationed buses. In addition to the training bay, the facility will include two adjoining classrooms with retractable walls, as well as a MB-1000 Municipal Bus

Driving Simulator to further facilitate observation and interactive education. The facility will also contain a lobby, break room, restrooms, an office, an electrical and sprinkler riser room, and a dedicated parts and tools storage area.

SunLine engaged KAT Consulting Services LLC, to conduct public outreach and prepare a facility equity analysis for the proposed Workforce Training Center in accordance with Title VI and FTA guidance. A copy of the facility equity analysis is attached to this report as Attachment 1.

The analysis compares the equity impacts of the following three site alternatives:

Site 1: North of the Operations Facility at 32505 Harry Oliver Trail, Thousand Palms, CA.

Site 2: North of the Administrative Building at 32505 Harry Oliver Trail, Thousand Palms, CA.

Site 3: Lot on Haskell Road south of Ramona Rd., Thousand Palms, CA.

The development of the project on these sites was deemed "Categorically Excluded" under the National Environmental Protection Act (NEPA), and qualifies for a "Categorical Exemption" under the California Environmental Quality Act (CEQA), both meaning that it would not have a significant impact on the environment.

During construction of the Center, construction-related noise and vibration may occur during daylight hours. SunLine will implement reasonable measures in line with industry practices to mitigate any construction-related impacts to the surrounding community. Once construction is completed and the Center is open, potential traffic impacts related to accessing the Center and potential noise impacts related to activities at the Center are expected to be negligible or nonexistent. SunLine expects overall impacts associated with operation of the Center to be similar to current conditions and consistent with the planned use at all three of the alternative sites.

Community outreach is a crucial factor in the Title VI equity analysis. SunLine solicited public feedback regarding the three proposed facility sites by distributing a public outreach flyer (refer to Appendix A in Attachment 1) explaining the project and the potential sites. The flyer was provided in both English and Spanish (printed in color, double-sided), and was mailed on February 5, 2026, to 329 residences and businesses located within a 0.5-mile radius of the proposed sites. All comments were requested by 5:00 pm on February 13, 2026. No responses were received during the designated public comment period.

The analysis evaluated whether any of the site alternatives would result in disparate impacts on minority populations, in accordance with Title VI. In general, a disparate impact exists when (i) a neutral policy/practice disproportionately affects members of a group identified by race, color, or national origin, (ii) there is no substantial legitimate justification for such

effects, and (iii) there is one or more alternatives that would serve the same objectives but with less disproportionate effect on the basis of race, color, or national origin.

The equity analysis compared the percentage of minorities in Thousand Palms to the percentage of minorities in the census block group and within a ½ mile radius of the three sites to show that adverse impacts of the project, if any, will not result in a significant disproportionate effect on the potentially impacted minority populations. The equity analysis concludes that none of the three proposed sites for the Workforce Training Center will impose a disparate impact on the basis of race, color, or national origin.

This equity analysis will be submitted to FTA as part of SunLine's next Title VI Program update in 2028.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

N/A

Approved/Reviewed by:

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

Attachments:

- [Item 11a](#) - Workforce Training Center Facility Title VI Equity Analysis



SunLine Transit Agency Workforce Training Center Title VI Equity Analysis

February 2026



Executive Summary

Established in 1977, SunLine Transit Agency (SunLine), a Joint Powers Authority based at 32-505 Harry Oliver Trail, Thousand Palms, CA, operates public transportation throughout Coachella Valley. Serving over 450,000 residents across 1,120 square miles, SunLine provides nearly 3 million annual passenger trips, connecting riders to jobs, healthcare, education, and major regional destinations via its Commuter Link service.

To meet the growing demand for high-quality instruction in advanced zero-emission technology, SunLine is planning to construct an 8,500 square-foot Workforce Training Center, designed as a state-of-the-art facility for practical training in zero-emission vehicle technology. When selecting the site for this new Workforce Training Center, SunLine is required to conduct a facility equity analysis to ensure that the facility site is chosen without regard to race, color, or national origin. This requirement is established by Title VI of the Civil Rights Act of 1964 ("Title VI"; 42 United States Code 2000d), 49 Code of Federal Regulation (CFR) Part 21, and the Federal Transit Administration (FTA) Title VI Circular 4702.1B.

SunLine engaged KAT Consulting Services LLC, to prepare the facility equity analysis. Per FTA Circular 4702.1B, the equity analysis must:

1. Occur before the selection of the preferred site.
2. Compare the equity impacts of the facility site alternatives to determine if any of the proposed locations of the project will result in a disparate impact on the basis of race, color, or national origin.
3. Assess whether similar facilities in the area could cause cumulative adverse impacts.
4. Contact people who are potentially impacted by the proposed facility site(s) and allow them to have input into the site selection process.

If it is determined if any of the proposed locations of the project will result in a disparate impact on the basis of race, color, or national origin, SunLine may only locate the project in that location "if there is a substantial legitimate justification for locating the project there, and where there are no alternative locations that would have a less disparate impact on the basis of race, color, or national origin." (FTA Circular 4702.1B, Ch. III, Sec. 13(c).)

Site Selection Process and Potential Impacts

Through its planning, evaluation criteria, and environmental review process, SunLine identified three existing parcels on its property as potential sites for the Workforce Training Center. The sites are centrally located within Thousand Palms, California, which has a population of 7,720. The analysis compares any potential equity impacts of the following three site alternatives:

Site 1: North of the Operations Facility at 32505 Harry Oliver Trail, Thousand Palms, CA.

Site 2: North of the Administrative Building at 32505 Harry Oliver Trail, Thousand Palms, CA.

Site 3: Lot on Haskell Road south of Ramona Rd., Thousand Palms, CA.

The site selection and equity analysis process included an evaluation of environmental data, review of SunLine's Title VI policies, and preliminary design plans. The impacts of each site were evaluated individually and cumulatively based on other facilities with similar impacts in the area. Other facilities in the area surrounding the three potential sites include SunLine's administrative buildings, maintenance facilities, and other smaller equipment shops. Further analysis was conducted based on an on-site review of the general geographic area, measurement of the site size and configuration, and site access from the proximity to nearby homes and businesses. There were no cumulative impacts or potential adverse impacts based from the existing facilities located on SunLine's property.

The development of the project on these sites was deemed "Categorically Excluded" under the National Environmental Protection Act (NEPA), and qualifies for a "Categorical Exemption" under the California Environmental Quality Act (CEQA), both meaning that it would not have a significant impact on the environment.

During construction of the Center, construction-related noise and vibration may occur during daylight hours. SunLine will implement reasonable measures in line with industry practices to mitigate any construction-related impacts to the surrounding community. Once construction is completed and the Center is open, potential traffic impacts related to accessing the Center and potential noise impacts related to activities at the Center are expected to be negligible or nonexistent. SunLine expects overall impacts associated with operation of the Center to be similar to current conditions and consistent with the planned use at all three of the alternative sites.

Community Outreach

Community outreach is a crucial factor in the Title VI equity analysis. SunLine's Title VI Program and Public Participation Plan outline how public feedback is collected to identify potential impacts, help shape alternatives, and ensure concerns.

SunLine solicited public feedback regarding the three proposed facility sites by distributing a public outreach flyer (refer to Appendix A) outlining project specifics and equity analysis requirements. The flyer was provided in both English and Spanish (printed in color, double-sided), and was mailed on February 5, 2026, to 329 residences and businesses located within a 0.5-mile radius of the proposed sites. All comments were requested by 5:00 pm on February 13, 2026. No responses were received during the designated public comment period.

Equity Analysis and Conclusions

The equity analysis compared the percentage of minorities in Thousand Palms, California to the percentage of minorities in the census block group and within a ½ mile radius of the three sites to show that adverse impacts of the project, if any, will not result in a significant disproportionate effect on the potentially impacted minority populations. The equity analysis concludes that none

of the three proposed sites for the Workforce Training Center will impose a disparate impact on the basis of race, color, or national origin.

1. Introduction

SunLine Transit Agency (SunLine) is a Joint Powers Authority created in 1977 to provide public transit service to its nine member cities and seven unincorporated communities in the Coachella Valley. Located at 32-505 Harry Oliver Trail, Thousand Palms, CA 92276, SunLine serves as the lifeline of the Coachella Valley's public transportation network, which supports over 450,000 residents across a 1,120-square-mile region. With nearly 3 million passenger trips provided annually, SunLine provides riders with access to jobs, healthcare, education, and other vital services. SunLine's Commuter Link service also connects the valley to major regional destinations, further expanding access and opportunity. SunLine's service area is 1,120 square miles with transit service offered throughout the urbanized areas and larger unincorporated communities of the Coachella Valley. SunLine's service area is located approximately 120 miles east of downtown Los Angeles and 60 miles east of the Inland Empire cities of Riverside and San Bernardino. The service area is bounded by the San Gorgonio Pass on the west and the Salton Sea on the southeast.

The Workforce Training Center is a proposed 8,500 square-foot, state-of-the-art facility. The Center will provide essential training for current and future transit professionals, emphasizing the skills necessary to operate and maintain zero-emission vehicle technology. Designed to enhance learning and practical application, the facility features a heightened drive-through training maintenance bay with a mezzanine mechanic platform for accessibility of upper areas of stationed buses. In addition to the training bay, the Center will include two adjoining classrooms with retractable walls, as well as house an MB-1000 Municipal Bus Driving Simulator to further facilitate observation and interactive education. The Center will also contain a lobby, break room, restrooms, an office, an electrical and sprinkler riser room, and a dedicated parts and tools storage area.

What is the Purpose and Need for the Workforce Training Center?

SunLine recognizes the need to ensure there is a skilled workforce capable of operating and maintaining advanced zero-emission technology vehicles. SunLine's regional system lacks a facility with sufficient capacity and suitable location to provide the essential training and develop the skills needed to operate and maintain zero-emission vehicle technology. The Workforce Training Center will serve as a training facility designed to educate operators and maintenance technicians on zero-emissions buses. The Workforce Training Center curriculum will provide training on fuel cell bus (FCB) diagnostics, routine maintenance and repairs, procurement, marketing and other FCE features. The Workforce Training Center instructors will educate and train participants about various aspects of FCBs.

What is a Title VI Facility Equity Analysis?

Title VI of the Civil Rights Act of 1964 ("Title VI"; 42 United States Code 2000d) prohibits discrimination based on race, color, and national origin in programs and activities receiving federal financial assistance. in accordance with Title VI, 49 Code of Federal Regulation (CFR) Part 21, and the Federal Transit Administration (FTA) Title VI Circular 4702.1B.

The Federal Transit Administration (FTA) of the U.S. Department of Transportation (DOT) provides financial assistance to develop new transit systems and improve, maintain, and operate existing systems and is responsible for ensuring that recipients follow federal statutory and administrative requirements. The FTA Circular 4702.1B provides recipients of FTA financial assistance with guidance and instructions necessary to comply with DOT's Title VI regulations (49 CFR Part 21), regardless of whether federal funding is being provided for the facility.

As a recipient of FTA financial assistance, SunLine must adhere to Title VI, DOT's Title VI regulations and FTA's Circular 4702.1B. SunLine is committed to ensuring that no person is excluded from participation in or denied the benefits of its transit services based on race, color, or national origin, in accordance with these legal requirements. The public can find SunLine's current Title VI Program that includes steps for submitting a Title VI complaint on the web at: <https://www.sunline.org/rider-resources/non-discrimination/civil-rights-title-vi>.

Title 49 CFR Section 21.5(b)(3) states, "In determining the site of location of facilities, a recipient or applicant may not make selections with the purpose or effect of excluding persons from, denying them the benefits of, or subjecting them to discrimination under any program to which this regulation applies, on the grounds of race, color, or national origin; or with the purpose or effect of defeating or substantially impairing the accomplishment of the objectives of the Act or this part."

FTA's Circular 4702.1B requires recipients to perform an equity analysis prior to constructing certain types of facilities with respect to where the facility is located to ensure the location is selected without regard to race, color, or national origin. Therefore, SunLine must conduct a Title VI equity analysis to ensure the location selected for the Workforce Training Center is done without regard to race, color, or national origin. Per guidance in the FTA 4702.1B Circular, the equity analysis must satisfy the following requirements:

1. Occur during the planning phase, before the selection of the preferred site.
2. Compare the equity impacts of the facility site alternatives to determine if any of the proposed locations of the project will result in a disparate impact on the basis of race, color, or national origin. A disparate impact is "a facially neutral policy or practice that disproportionately affects members of a group identified by race, color, or national origin, where the agency's policy or practice lacks a substantial legitimate

justification and where there exists one or more alternatives that would serve the same legitimate objectives but with less disproportionate effect on the basis of race, color, or national origin." (FTA Circular 4702.1B, Ch. I, Sec. 5(f).)

3. Assess whether similar facilities in the area could cause cumulative adverse impacts.
4. Contact people who are potentially impacted by the proposed facility site(s) and allow them to have input into the site selection process.

If any of the locations will result in a disparate impact, SunLine may only locate the project in that location "if there is a substantial legitimate justification for locating the project there, and where there are no alternative locations that would have a less disparate impact on the basis of race, color, or national origin." (FTA Circular 4702.1B, Ch. III, Sec. 13(c).)

2. Potential Sites and Adverse Impacts

Through its planning, evaluation criteria, and environmental review process, SunLine identified three existing parcels on its property as potential sites for the Workforce Training Center. The sites are centrally located within Thousand Palms, California, which has a population of 7,720. The analysis compares any potential equity impacts of the following three site alternatives:

Site 1: North of the Operations Facility at 32505 Harry Oliver Trail, Thousand Palms, CA.

Site 2: North of the Administrative Building at 32505 Harry Oliver Trail, Thousand Palms, CA.

Site 3: Lot on Haskell Road south of Ramona Rd., Thousand Palms, CA.



Selection Criteria

The following criteria will guide the final site selection process:

- 1) Provides safe access to facilities for the public and employees.
- 2) Be fire marshal approved as per the mandatory fire marshal criteria.
- 3) Be large enough to support development for the facility with potential for expansion.
- 4) Be level, so that extensive grading is not required.
- 5) Have communications, water, electric and sewer service, or access to the same.
- 6) Be free of hazardous waste or be capable of remediation at low cost.
- 7) Be in an area of compatible land uses (preferably zoned for industrial or commercial).
- 8) Be available, cost effective, and eligible for grant funds for development and construction.
- 9) Have proximity to major streets for ease of access.

- 10) Not result in a disparate impact on the basis of race, color, or national origin. If the location results in a disparate impact, there must be a substantial legitimate justification for locating the project there, and no alternative locations that would have a less disparate impact on the basis of race, color, or national origin.
- 11) Qualify for a categorical exemption under the California Environmental Quality Act (CEQA), which is an official determination that a project will not have a significant impact on the environment. The project complies with CEQA Categorical Exemption Class 3: "[C]onstruction and location of limited numbers of new, small facilities or structures . . . [including] up to four . . . buildings not exceeding 10,000 square feet in floor area on sites zones for such uses." (Title 14, Cal. Code of Regs., §15303.)
- 12) Have environmental clearance under the National Environmental Policy Act (NEPA) for categorical exclusion (CE). Through the FTA grant award process, construction of the facility was determined by FTA to be categorically excluded under the NEPA. (See 23 CFR §771.118(c)(9): "Assembly or construction of facilities that is consistent with existing land use and zoning requirements (including floodplain regulations) . . . and uses primarily land disturbed for transportation use . . . within areas of the right-of-way occupied by the physical footprint of the existing facility or otherwise maintained or used for transportation operations; and parking facilities." The NEPA CE classification that SunLine received from the FTA applies to all three potential sites, confirming that the project will not have a significant effect on the human environment, individually or cumulatively.

The conclusion under both the CEQA categorical exemption and the NEPA categorical exclusion analyses is that the proposed project will have a less-than-significant environmental impact and will not cause substantial adverse effects on human beings, either directly or indirectly. In addition, for practical purposes, neither of the three sites will have an adverse impact based on Section 106 Historical Preservation Act requirements, nor are they considered unique archeological sites. This is primarily due to the existing roadway infrastructure and development in and around the proposed facility sites. Although the project is not expected to result in significant effects on the human environment, the project may have some adverse effects on the community, which are discussed in the "Potential Adverse Effects" section of this analysis.

The following analysis considers each site based on some of the criteria listed above.

**Site 1: Location: North of Operations Facility / APN 693-040-028
Latitude 33.812825 / Longitude -116.394998**

Burdens:

- Site 1 has a potential impact on the operator parking lot and facility, impacting the safety of operators and staff as they traverse the pedestrian walkway.
- The County permit for this location is limited to parking only and not for facility construction.

- Site 1 has no ability for future expansion.

Benefits:

- Site 1 allows redevelopment of vacant commercial/industrial land to provide higher use.
- No displacement of residents or businesses.
- Housing is ½ mile north of the proposed project area with only seven (7) housing units closest to the proposed project area – therefore, there is no immediate impact affecting persons in the housing units.

**Site 2: Location: North of Administration Bldg. / APN 693-040-029
Latitude 33.815178 / Longitude -116.394944**

Burdens:

- Site 2 is ¼ mile from seven (7) residential units. Although closer in proximity to the housing units than Site 1, there is a major street (Ramon Rd) that serves as a barrier between the project site and the housing units.

Benefits:

- Site 2 is located to prioritize safety while supporting efficient training.
- Site 2 not only supports a smooth transition to the bus training grounds but also ensures a secure environment by providing a gated separation from restricted operational and maintenance areas, reducing the risk of unauthorized access or accidental interference.
- Site 2 allows training activities to take place without compromising the safety of participants or agency operations.
- Public visitors can safely access the facility via Haskell Road, away from high-risk areas, while internal staff benefit from a controlled two-panel swing gate and side entrance, reinforcing a secure and structured flow into and out of the Center.
- Site 2 will not impede parking for operators, improving safety and ease of pedestrian access.
- No displacement of residents or businesses.

**Site 3: Location: Haskell Road / APN 693-020-036
Latitude 33.816105 / Longitude -116.396414**

Burdens:

- Site 3 is closest to the 7 residential units than Sites 1 and Site 2.
- Site 3 is near Ramon Rd which has higher traffic volumes that could impact noise levels in the classrooms of the facility and limit the ease of access to the facility.

- Haskell Rd. is slated for closure and could limit the ability for ease of access to the facility.
- Site 3 is furthest in proximity to the existing offices and maintenance facilities.

Benefits:

- No displacement of residents or businesses.

Potential Adverse Impacts

Given that the three proposed sites are situated so close to one another, the potential impacts of the project are expected to be consistent across all locations within ½ mile of the proposed sites.

As previously stated, the conclusion under both the CEQA and NEPA analyses is that the proposed project will not result in significant impacts on humans and the environment, either individually or cumulatively. During construction of the Center, construction-related noise and vibration may occur during daylight hours. SunLine expects construction to take approximately one (1) year and will implement reasonable measures in line with industry practices to mitigate any construction-related impacts to the surrounding community.

Once construction is completed and the Center is open, SunLine employees will travel either by foot from SunLine's surrounding properties to the Center, or by car from other locations to the Center. Training activities conducted at the Center are not expected to result in noticeable increases in noise. SunLine expects overall impacts associated with operation of the Center to be similar to current conditions and consistent with the planned use at all three of the alternative sites.

With residential properties within ¼ mile of the proposed sites, it is highly unlikely that increased levels of noise, light, or traffic resulting from the construction or operation of the Center will adversely impact residents. All three proposed sites are physically separated from the closest housing community by a major arterial (Ramon Rd.), which mitigates any noise, light, or traffic that could result from the construction or operation of the Center on the opposite side of Ramon Rd.

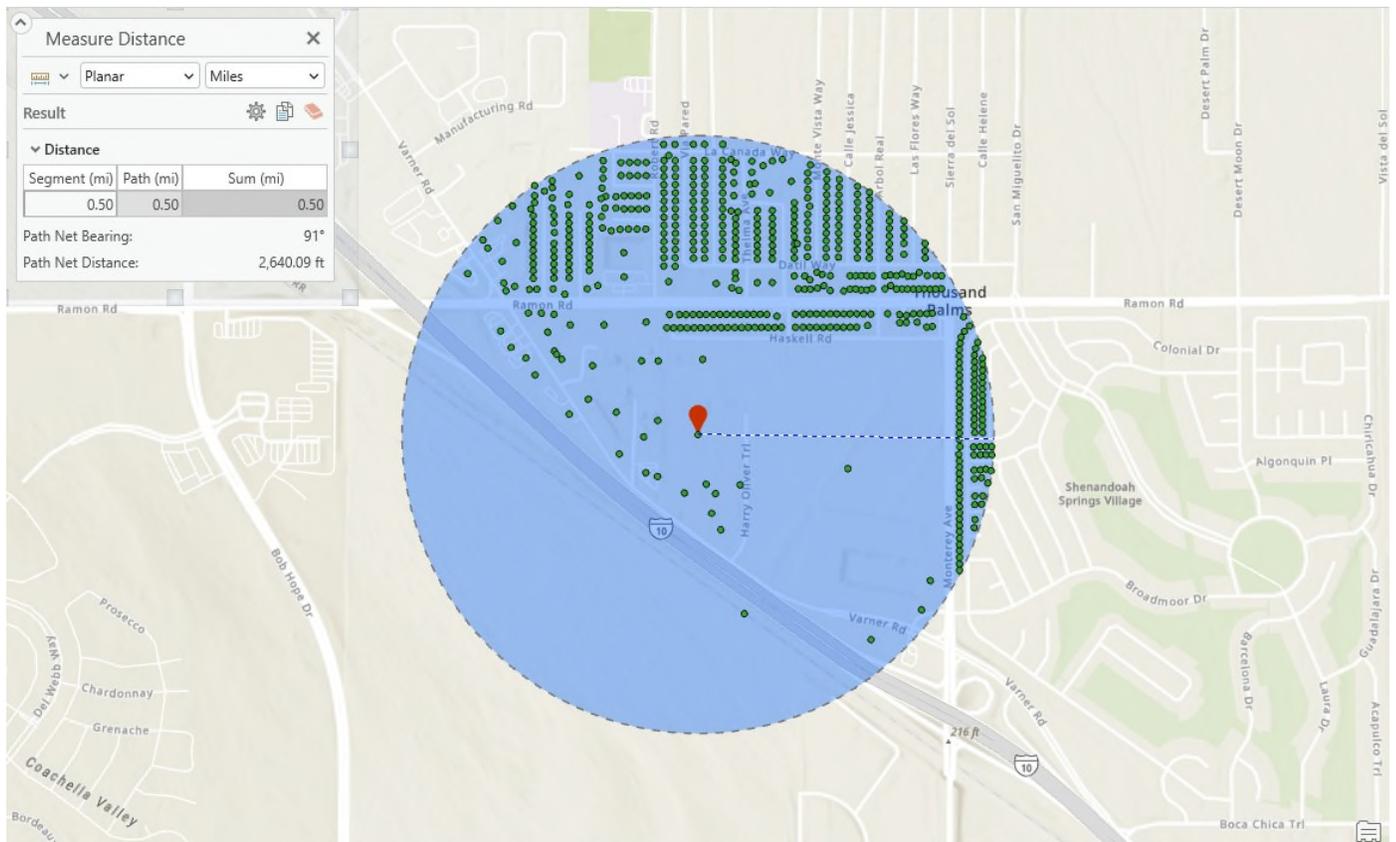
FTA recommends evaluating other facilities with similar impacts in the area to determine if any cumulative adverse impacts might result. Because all three proposed sites are on SunLine's property group that includes administrative buildings, maintenance facilities, and other smaller equipment shops, the three proposed sites do not pose any potential localized impacts. Further analysis was conducted based on an on-site review of the general geographic area, measurement of the site size and configuration, and site access from the proximity to nearby homes and businesses. There were no cumulative impacts or potential adverse impacts considering the existing facilities located on SunLine's property.

3. Title VI Public Outreach

As specified in SunLine’s Public Participation Plan, SunLine is committed to providing equitable, accessible, and inclusive opportunities for public engagement in the planning, programming, and decision-making processes for transit services.

The project location is in Thousand Palms, California, which is primarily a low-density residential community with significant senior population, high share of manufactured homes, and age-restricted housing developments.

SunLine solicited public feedback regarding the three proposed facility sites by distributing a community outreach flyer (refer to Appendix A) outlining the purpose of the project, clearly identifying the three potential sites, and requesting feedback be provided to SunLine by email or phone. The flyer, printed in color, in English on one side and in Spanish on the other side, was mailed on February 5, 2026 to 329 residential and business addresses within half a mile of the proposed sites. Recipients were asked to submit comments by 5:00 pm on February 13, 2026. No responses were received during the public comment period.



4. Equity Analysis

The purpose of this equity analysis is to determine whether locating the Workforce Training Center at any of the three proposed sites would result in a disparate impact based on race, color, or national origin. A disparate impact is "a facially neutral policy or practice that disproportionately affects members of a group identified by race, color, or national origin, where the agency's policy or practice lacks a substantial legitimate justification and where there exists one or more alternatives that would serve the same legitimate objectives but with less disproportionate effect on the basis of race, color, or national origin." (FTA Circular 4702.1B, Ch. I, Sec. 5(f).) If any of the locations will result in a disparate impact, SunLine may only locate the project at that location "if there is a substantial legitimate justification for locating the project there, and where there are no alternative locations that would have a less disparate impact on the basis of race, color, or national origin." (FTA Circular 4702.1B, Ch. III, Sec. 13(c).)

Pursuant to FTA Circular 4702.1B, "minority" persons include those who identify as (1) American Indian and Alaska Native; (2) Asian; (3) Black or African American; (4) Hispanic or Latino; and (5) Native Hawaiian or Other Pacific Islander. (FTA Circular 4702.1B, Ch. I, Sec. 5(q).) A "minority population" for purposes of this analysis means "any readily identifiable group of minority persons who live in geographic proximity and, if circumstances warrant, geographically dispersed/transient populations (such as migrant workers or Native Americans) who will be similarly affected by a proposed DOT program, policy, or activity." (FTA Circular 4702.1B, Ch. I, Sec. 5(r).)

The project will be located in Thousand Palms, California, which is primarily a low-density residential community with a significant senior population, high share of manufactured homes, and age-restricted housing developments. 70% of Thousand Palms' racially diverse population identifies as minority: Hispanics/Latinos = 67%, Whites = 30%, Blacks = 0.2%, Asians = 1%, Natives = 1% and Other = .8%.¹

Based on the National Geospatial Data Asset data from the U.S. Census Bureau, all three sites are located within the same census block.² This census block has a total population of 25 residents, of which 68% identify as minority, with 32% identifying as Two or More Races. Other minority populations in this census block include Asian (4%), Black or African American (4%), and Other Race (16%).³ Therefore, the minority population in the census block in which the project will be located is 2% lower than the minority population in Thousand Palms. Within a ½ mile radius of the three sites, there are 34 census blocks consisting of 2,188 residents, 76% of which identify as

¹ U.S. Census Bureau 2024 American Community Survey (ACS) 5-Year Estimates Data Profiles for Demographic and Housing Characteristics in Thousand Palms CDP, California, available at: <https://data.census.gov/table/ACSDP5Y2024.DP05?q=Thousand+Palms+CDP,+California>

² National Geospatial Data Asset data from the U.S. Census Bureau, block 4012 in tract 044505, in Riverside County, California, available at: <https://hub.arcgis.com/datasets/fedmaps::u-s-census-blocks-1/explore?location=33.812721%2C-116.395135%2C16>.

³ U.S. Census Bureau Decennial Census data for block 4012 filtered by Race, available at: <https://data.census.gov/table?g=1000000US060650445054012&y=2020>.

minority.⁴ This minority population is very close in size (6% higher) to the minority population of Thousand Palms.

These findings support the conclusion that any adverse impacts of the project, which are expected to be minimal or nonexistent, will not disproportionately affect members of a group identified by race, color, or national origin. Therefore, locating the Workforce Training Center at any of the three sites would not result in a disparate impact based on race, color, or national origin.

5. Conclusion

The three proposed sites do not present any significant environmental, economic, or land use compatibility concerns. Any adverse impacts of the project are expected to be minimal or nonexistent, and will not materially disproportionately affect the minority population in which the sites are located. Therefore, none of the three proposed sites for the Workforce Training Center will result in a disparate impact based on race, color, or national origin.

⁴ U.S. Census Bureau 2020 Census Demographic and Housing Characteristic (DHC) data for Total Population by Sex, Age, and Race, available at https://services.arcgis.com/P3ePLMYs2RVChkxj/arcgis/rest/services/USA_Census_2020_DHC_Total_Population/FeatureServer



Board Report

AGENDA ITEM: INFORMATION

TO: Strategic Planning & Operational Committee/Committee of the Whole Board of Directors

FROM: Greg Wildman, Chief of Strategic Alignment

SUBJECT: Continuation of Fiscal Year (FY) 2025 SunLine Goals, Strategic Objectives and Priorities

Recommendation:

Recommend that the Board of Directors (Board) receive the mid-year update on the Continuation Fiscal Year (FY) 25 SunLine Transit Agency's (SunLine) Goals, Strategic Objectives and Priorities (FY 25 Goals) and provide feedback as appropriate.

Background:

The CEO/General Manager and staff collaborated to develop the FY 2024-25 Goals which sets forth five (5) Performance Goals:

1. Workforce Investment: Facilitate a healthy workforce and ensure that they are adequately supported and equipped with the knowledge, expertise and experience to meet SunLine's operational requirements as they evolve and grow over time.
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.
3. Organizational Health and 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).

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.
5. Environmental Stewardship: Pursue and implement service and capital investments that lead to cleaner air, a healthier environment and improved quality of life for Coachella Valley residents and SunLine employees.

In June 2024, the Board adopted SunLine's FY 2024-25 Goals which: 1) provide a foundation for the FY 2024-25 Operating and Capital Budget, and; 2) ensure the CEO/General Manager and staff remain focused on key initiatives for meeting the mobility and service needs of SunLine customers and local communities within SunLine's service area.

A fiscal year-end report on the status of these goals was submitted and accepted at the June 2025 Board of Directors meeting. At the time the report was submitted, there remained a large number of open items. The agency continued those items into FY26 to monitor and report on progress made toward the achievement of those items.

This mid-year update details the substantial progress made toward achieving the FY 25 Strategic Plan and the established goals, strategic objectives and priorities. When the FY 25 strategic priorities and objectives were established, the plan contained sixty-eight (68) items covering a range of issues including driver and passenger safety, bus availability and service reliability, the need for workforce training and development, as well as financial stability and forecasting. As of December 31, 2025, fifty-five (55) of these items have been resolved and closed. Activities needed to sustain or advance the goals have been incorporated into departmental standards and are reflected in their FY 26 goals.

For this report, progress is noted as bulleted items in the section, **Progress Update: January 2026**, in Attachment 12a to this report.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

Tamara Miles, Chief of Human Relations
Isabel Vizcarra, Chief Transportation Officer
Luis Garcia, Chief Financial Officer
Walter Watcher, Chief of Capital Projects
Byan Valenzuela, Chief Safety Officer
Mark Perry, Chief Maintenance Officer
Edith Hernandez, Director of Board and External Affairs
Ray Stevens, Deputy Chief of General Services
Dylan Narz, Deputy Chief Transit Systems and Technology

Approved/Reviewed by:

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

Attachments:

- [Item 12a](#) - Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

Strategic Priority 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.

Strategic Priority 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.

Strategic Priority 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.

Strategic Priority 4: Safety and Security – Our 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.

Strategic Priority 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.

Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

This FY 2025 Goal supports the following from the FY '26 Strategic Plan: **STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.

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.

STRATEGIC OBJECTIVES	PRIORITIES		
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20px; text-align: center; vertical-align: middle;">A</td> <td>Establish a formal training program for fleet maintenance staff</td> </tr> </table>	A	Establish a formal training program for fleet maintenance staff	i. Partner with the College of the Desert (COD), California Transit Works (CTW), and the Amalgamated Transit Union (ATU) on a multi-faceted training program that also includes an apprenticeship program.
A	Establish a formal training program for fleet maintenance staff		
Priority Owner: Isabel Vizcarra, CTO	Department: Operations		

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: _____

Goal status as of 6/30/26 Completed and closed In place/monitoring; expected closure: _____ In process/Continue to FY 27

Progress Update: January 2026

- This priority has been refined to focus on progress made solely toward the development and implementation of the Mentor Program for operators after July 1, 2025. This is a joint project between STA and ATU Local 1277. The project name is ATLAS. Given the scope involved, the development of the apprenticeship programs for operators and maintenance is deferred pending implementation of the Mentor program.
- Outreach for mentor applications occurred on October 22, 2025, with the application period closing on November 17, 2025. STA received 30 mentor applications, of which 13 were approved: 8 Fixed Route Operators, 3 Paratransit Operators, and 2 Maintenance employees.
- Mentor training for all approved mentors was conducted by CTW on December 8 and 9, 2025.
- In January 2026, 21 mentees were paired with mentors. Each mentee will be assigned a mentor for a 12-month period.
- Accountability for this objective will close for FY 25. Reporting to continue under the FY 26 Strategic Priority 1, Service Reliability, Strategic Goal 7 to decrease voluntary turnover.

Progress Update: July 2025

- The \$75,000 pass-through grant agreement between SunLine Transit Agency and ATU was fully executed on April 10, 2025.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- The committee responsible for bringing this project to fruition, comprised of ATU representatives and members, and STA management, was engaged in preparatory work throughout 2024, including a retreat to the Bay Area to develop knowledge and understanding of program content and structure from other transit agency programs that have been fully implemented.
- The committee continues to meet monthly and work toward achieving the project goals, including the selection of the program name, ATLAS (ATU & SunLine Learning and Skills), and selection of the Mentor Coordinator, whose role is to recruit, train and support qualified mentors from within the organization, and facilitate the connection between mentors and mentees.
- The committee will again be convening in the Bay Area the third week of July 2025 to facilitate team building and group dynamics, as well as participate in more in-depth examination of programs already in effect at three transit agencies: AC Transit, SamTrans, and SJRTD.

Progress Update: December 2024

- The ATU offered a pass-through grant of \$75,000 to fund the development of a mentor program for bus operators and mechanics, which would be the foundation for apprenticeship programs for both classifications. SunLine executed the grant agreement, and it is now being finalized with the ATU.
- A participation agreement was executed with CTW on October 23rd. CTW will facilitate coordination between SunLine, the ATU, College of the Desert and other stakeholders for establishing the mentor and apprenticeship programs.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

This FY 2025 Goal supports the following from the FY '26 Strategic Plan: **STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.

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.

B	Establish a formal training program for fleet maintenance staff	i. Partner with the California Transit Training Consortium (CTTC), the College of the Desert, and/or other training partners (e.g., OEMs, CTW, etc.) to establish formal curriculum on zero emission fleet and facility maintenance, operation, and safety.
----------	---	---

Priority Owner: Greg Wildman	Department: Strategic Alignment
-------------------------------------	--

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: _____

Goal status as of 6/30/26 Completed and closed In place/monitoring; expected closure: _____ In process/Continue to FY 27

Progress Update: January 2026

- CTTC continues with the development of the Electrical Fundamentals course; 2/3 courses are finalized, the third is out for SME review. Target completion date for CTTC Electrical Fundamental course is April 2026.
- Ballard provided training to mechanics on fuel cell repair; provided OEM training materials and authorized SunLine to provide in-house training.
- Maintenance initiated the training materials development process for 3 of 4 essential zero-emissions training modules: 1) Zero-emissions orientation, 2) Preventative Maintenance, 3) Diagnostics and Repair. Deadline for completing these modules is December 31, 2026.
- Curriculum for module 4, Advanced Fuel Cell Technologies Diagnostic and Repair, is scheduled for completion no later than December 31, 2027.
- Work on this initiative continues at the Maintenance Department level. Further updates shall be provided in accordance with Strategic Priority 5 in the FY 26 Strategic Plan.

Progress Update: July 2025

- SunLine executed an agreement with CTTC in March 2025. Work is anticipated to be completed by April 2026.
- CTTC is in final review stage of the curriculum for the first computer-based “Electrical Fundamentals” course with rollout for the course occurring in August 2025. CTTC is currently in the draft stages of curriculum development for the instructor-led course, “Electrical Circuit Diagnosis” course.

Progress Update: December 2024

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- SunLine executed a contract with ZEB Tech Hall on October 30th, who is a proven consulting firm in building zero emission vehicle (ZEV) training curriculum. They will develop most, if not all, of the curriculum that will feed into the mentor and apprenticeship programs being built with the ATU and CTW. They will also coordinate with the College of the Desert and maintenance staff to potentially obtain accreditation of SunLine's training program.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.</p>	
<p>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.</p>	
<p>B Establish a formal training program for fleet maintenance staff</p>	<p>ii. Continue to pursue workforce development funds to support staff investment.</p>
<p>Priority Owner: Luis Garcia</p>	<p>Department: Finance</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p>	
<ul style="list-style-type: none"> Staff conducted grant amendments in coordination with the CTTC and CEC to ensure the work aligns with the best work product and funding compliance. Staff continued to include workforce development funding in grant applications and will continue to do so moving forward. Staff included workforce development funding in grant applications that were submitted. Additionally, SunLine has engaged a grant writing firm and has prioritized workforce development funds as a major area of focus. Securing grants and other funding sources for projects and initiatives is institutionalized practice for the Finance Department. Further initiatives to secure funding will be reported under the objectives and goals for that department under Strategic Priority 6. Resource acquisition, allocation and management (RAAM), and in conjunction with other departments or beneficiaries of those grants. 	
<p>Progress Update: July 2025</p>	
<ul style="list-style-type: none"> Staff continues researching workforce development funding and will be including workforce development as a component of Bus and Bus Facilities and Low or No Emission grant submittals in July 2025. 	
<p>Progress Update: December 2024</p>	
<ul style="list-style-type: none"> In addition to obtaining funds through the ATU, staff is working with advocates at the State and federal levels to seek funding for SunLine and CTTC. CTTC’s focus is to develop standardized ZEV training curriculum that can be used by SunLine to train mechanics. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.</p>					
<p>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.</p>					
B	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;">Establish a formal training program for fleet maintenance staff</td> <td style="padding: 5px;">iii. Work with staff to identify training equipment and resources necessary for increasing training effectiveness onsite.</td> </tr> <tr> <td style="padding: 5px;">Priority Owner: Greg Wildman</td> <td style="padding: 5px;">Department: Strategic Alignment</td> </tr> </table>	Establish a formal training program for fleet maintenance staff	iii. Work with staff to identify training equipment and resources necessary for increasing training effectiveness onsite.	Priority Owner: Greg Wildman	Department: Strategic Alignment
Establish a formal training program for fleet maintenance staff	iii. Work with staff to identify training equipment and resources necessary for increasing training effectiveness onsite.				
Priority Owner: Greg Wildman	Department: Strategic Alignment				
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>					
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>					
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Curriculum and methodology to objectively assess and test C-level mechanic competency completed 12/31/25. Currently in testing phase. CTTC continues with the development of the Electrical Fundamentals course; 2/3 courses are finalized, the third is out for SME review. Target completion date for CTTC Electrical Fundamental course is April 2026. The Maintenance Department has acquired training resources and equipment (i.e., Ballard fuel cell training program, Air Brake Training and associated training tools) to support general maintenance skills as well as ZEB training. The Maintenance Department continues to identify and pursue necessary training resources to build skill and competency amongst its Maintenance Mechanics. Work on this initiative continues at the Maintenance Department level. Further updates shall be provided in accordance with Strategic Priority 5 in the FY 26 Strategic Plan. 					
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> The engineering firm for the workforce development building was placed under contract in June 2025. Engineering plans are scheduled to be completed by March 2026. Scope of work documents for the workforce development building engineering and permitting effort are complete and in final review. Engineering firm under contract in June 2025. Work continues on identifying training aids, and acquisition will coincide with building construction. Staff continues work to identify resources while developing the multi-faceted training program. Superintendent of Zero Emissions Technology is developing curriculum and methodology to objectively assess and test C-level mechanics competency to advance to B-level within 90 days of employment. Staff is working collaboratively with the CTTC to identify required training modules. 					

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- The first in a series of training courses developed by CTTC in conformance with Grant Agreement # ARV-21-070-01 is expected to launch online in August 2025.

Progress Update: December 2024

- Staff is working collaboratively with the CTTC to identify required training modules.
- Scope of work documents for the workforce development building engineering and permitting effort are complete and in final review. Staff's goal is to have an engineering firm under contract by March 2025 and have the project into permitting phase by June 2025. Work is continuing on identifying training aids and acquisition will coincide with building construction. Work is continuing with staff to identify resources while developing the multi-faceted training program.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

This FY 2025 Goal supports the following from the FY '26 Strategic Plan: **STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.

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.

C	Build the leadership capacity of the Executive Team	i. Coach and support staff on making strategic decisions independently.
----------	---	---

Priority Owner: Greg Wildman	Department: Strategic Alignment
-------------------------------------	--

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: _____

Goal status as of 6/30/26 Completed and closed In place/monitoring; expected closure: _____ In process/Continue to FY 27

Progress Update: January 2026

- Each department developed goals as part of the Goals Cascading project in association with the FY 26 Strategic Plan. Goals were shaped to conform with and to the benefit of the established Strategic Priorities and Goals.
- This objective is being internalized as a regular function of each department’s department and individual goal development process and fulfillment of this objective shall be transferred to each department’s reporting requirements.

Progress Update: July 2025

- SunLine collaborated with COD to develop and launch the "Visionary Leaders" training program. All chiefs participated in the program, which was completed in January 2025. The program was designed to foster and promote the Chiefs’ abilities to think and act strategically and independently, assess risk, determine best practices, and advance the Agency’s strategic goals and objectives.
- SunLine University created and launched an online Supervisor training program to elevate the skills of supervisors and managers to improve managerial competency. The program consisted of three trimesters with a total of 32 hours focusing on the fundamental skills of supervision and management. Roundtable presentations were presented monthly where small group presentations reinforced learning and the application of the concepts. The program concluded in January 2025.
- SunLine University continued to offer instructor-led training on more advanced management concepts, to include Building Bridges: The Essential Role of Trust in the Workplace, Tools and Techniques for Root-Cause Analysis, and Motivational Leadership. Online management training continues monthly with content provided through the Lorman online learning platform.
- Human Resources and Labor Relations developed and implemented a comprehensive labor relations strategy to centralize and standardize administrative process and procedures to increase the cohesiveness labor relations practices across the agency.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- Insight Strategies' continued work with executive leadership and management culminated in the presentation and adoption of the FY26 Strategic Plan by the Board of Directors.
- Goal Cascading workshops have been conducted to develop and incorporate departmental and individual goals to support the achievement of the Strategic Plan.

Progress Update: December 2024

- Insight Strategies has been actively working with the entire Executive Team, and most recently, our mid-level managers to strengthen strategic planning and decision-making abilities.
- Our Chief Maintenance Officer has been meeting with all 3 shift supervisors almost daily to discuss decision-making processes regarding the fleet and its progression back to a quality and reliable fleet.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

This FY 2025 Goal supports the following from the FY '26 Strategic Plan: **STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.

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.

C	Build the leadership capacity of the Executive Team	ii. Provide coaching by external consultants/formal executives to support leadership growth.
----------	---	--

Priority Owner: Luis Garcia/Isabel Vizcarra **Department:** Finance and Operations

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: _____

Goal status as of 6/30/26 Completed and closed In place/monitoring; expected closure: _____ In process/Continue to FY 27

Progress Update: January 2026

- The Chief Financial Officer and the Chief Transportation Officer completed their external consultant executive coaching sessions provided through Insight Strategies as of 12/16/25.
- **Progress Update: July 2025**
- Individualized and one-on-one leadership coaching provided through Insight Strategies beginning in May 2025 for the Chief Financial Officer and Chief Transportation Officer. Focus areas are communication, emotional intelligence, decision-making, delegation and strategic thinking.
- Coaching is ongoing.
- **Progress Update: December 2024**
- In addition to support from Insight Strategies, coaching/mentoring consultant services have been secured to support the implementation of SunLine's strategic goals, objectives and priorities, primarily in the marketing, maintenance, operations, planning and legislative affairs areas.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.</p>			
<p>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.</p>			
C	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; border: 1px solid black; padding: 2px;">Build the leadership capacity of the Executive Team</td> <td style="border: 1px solid black; padding: 2px;">iii. Utilize Insight Strategies to support strategic thinking efforts.</td> </tr> </table>	Build the leadership capacity of the Executive Team	iii. Utilize Insight Strategies to support strategic thinking efforts.
Build the leadership capacity of the Executive Team	iii. Utilize Insight Strategies to support strategic thinking efforts.		
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; border: 1px solid black; padding: 2px;">Priority Owner: Mona Babauta</td> <td style="border: 1px solid black; padding: 2px;">Department: Executive Leadership</td> </tr> </table>		Priority Owner: Mona Babauta	Department: Executive Leadership
Priority Owner: Mona Babauta	Department: Executive Leadership		
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>			
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>			
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> The agency engaged the services Teri Fisher of Insight Strategies to facilitate a culture renovation/transformation project beginning in March 2024. Through the cooperative efforts of Ms. Fisher and the agency, the Executive Team, with participation from other members of the management team, developed new mission, vision and values statements, as well as collaboratively developed the agency’s strategic priorities and goals. The extensive process resulted in the Executive Team developing knowledge and understanding of the necessity of strategic thinking, and the skill to apply knowledge required to transform the agency into a high-performance organization. While the Insight Strategies program concluded as of December 2025, the work continues with each executive critically examining situations, potential solutions, and the effects of the decision-making process. The agency continues its efforts to institutionalize and enculturate the guidelines and principles of strategic thinking into its daily practices and processes. 			
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Process continues. See Goal 1, subpart C. i, above. Insight Strategies is currently supporting the development and implementation of a comprehensive performance management system. This new system will focus on the achievement of organizational, departmental and individual goals, as well as demonstration and application of leadership competencies and skills. 			
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> In progress. See Goal 1, subpart C. i above. 			

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.</p>	
<p>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.</p>	
<p>C Build the leadership capacity of the Executive Team</p>	<p>vi. Point staff to industry training and networking opportunities.</p>
<p>Priority Owner: Greg Wildman</p>	<p>Department: Strategic Alignment</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p>	
<ul style="list-style-type: none"> Several executive, managerial, line staff and members of the Board of Directors attended professional industry training workshops, to include, but not limited to, Mpact in Portland, APTA, CALPERLA. A complete list of attendance at industry conferences, workshops and networking opportunities can be found in the CEO/GM Update provided at each meeting of the Board of Directors. Opportunities for staff to attend conferences, et al, has become institutionalized practice throughout agency. Further reporting will be provided exclusively through the CEO/GM report. 	
<p>Progress Update: July 2025</p>	
<ul style="list-style-type: none"> Staff attended several conferences, training opportunities and networking events throughout the latter half of FY 25. CFO training and networking efforts: Mobility 21 Legislative Reception (February 2025), APTA CEO Conference (March 2025), APTA Legislative Conference (May 2025). 	
<p>Progress Update: December 2024</p>	
<ul style="list-style-type: none"> In progress; training details may be found in the monthly GM Report in the Board of Directors Packets. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.</p>	
<p>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.</p>	
<p>D Conduct organizational assessment(s) to identify areas for improvement and prioritize training investments</p>	<p>i. Continue working with Insight Strategies to survey employees to understand their professional needs.</p>
<p>Priority Owner: Tamara Miles</p>	<p>Department: Human Resources</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Learning needs assessment and queries regarding professional development requirements have become institutionalized agency practice. Ongoing assessments will be conducted in accordance with Strategic Priority 5: People/Workforce, Strategic Agency Goal 2. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> See Goal 1, subpart C. i, above. Hanson Bridgett conducted an on-site specialized harassment training for all levels of management. Implemented a comprehensive, agency-wide crisis awareness and de-escalation training program that began in May 2025 and represents a critical step in aligning with the Federal Transit Administration’s (FTA) General Directive 24-1, which mandates proactive measures to address the rising threat of assaults on transit workers. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Almost all of SunLine’s Department Chiefs are completing a leadership training program through the College of the Desert. Mid-managers and supervisors throughout the organization are completing supervisor training. The Chief Maintenance Officer is working with SunLine’s Safety and Training department to ensure all mechanics get their Class B licenses, which are necessary for performing the full range of their jobs. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.</p>	
<p>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.</p>	
<p>E Create career ladders/pathways for staff to grow and improve competitiveness for promotions</p>	<p>i. Continue training offerings through SunLine University.</p>
<p>Priority Owner: Greg Wildman</p>	<p>Department: Strategic Alignment</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p>	
<ul style="list-style-type: none"> Supervisory and management staff continue professional development activities using the Lorman training platform. College of the Desert, through its PACE program, provided two in-person training programs. Fixed-route and paratransit dispatchers are participating in a series of introductory training courses for supervisory skill development as part of the career ladder to support their ability to apply and compete for supervisory positions. Because training and development is a continuing activity, this goal will be closed out for FY 25 and incorporated into Strategic Priority 5: Strategic Agency Goal 2. 	
<p>Progress Update: July 2025</p>	
<ul style="list-style-type: none"> See Goal 1, subpart C. i. above. Two staff in the Capital Projects Department are enrolled in the Project Management Institute’s program leading to certifications in project management. HR Manager received Transit Paratransit Management Certificate on May 15, 2025 from the University of the Pacific. Finance staff attended grant training courses, Government Finance Officers Association (GFOA) conference, audit workshop and updates. Promoted internal collaboration with departments to address labor relations issues and promote adherence to performance expectation. SunLine contracted with the ADA Guru to provide training in June 2025 for agency staff regarding ADA compliance, wheelchair securement, and other topics important to dispatchers, trainers, and operators. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

Progress Update: December 2024

- Ongoing

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.</p>			
<p>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.</p>			
E	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; border-right: 1px solid black; padding: 5px;"> Create career ladders/pathways for staff to grow and improve competitiveness for promotions </td> <td style="padding: 5px;"> ii. Build training opportunities, as appropriate and as resources allow, into employee work plans. </td> </tr> </table>	Create career ladders/pathways for staff to grow and improve competitiveness for promotions	ii. Build training opportunities, as appropriate and as resources allow, into employee work plans.
Create career ladders/pathways for staff to grow and improve competitiveness for promotions	ii. Build training opportunities, as appropriate and as resources allow, into employee work plans.		
Priority Owner: Greg Wildman	Department: Strategic Alignment		
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____			
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27			
Progress Update: January 2026			
<ul style="list-style-type: none"> The Maintenance Department continues to provide Zero-emissions training for its mechanics. Curriculum development in key content areas continues. Training expectations have been established for all mechanics. Sunline has transitioned its Performance Management process for non-bargaining employees to PerformYard. A key feature of this new system is a built-in career development page. Supervisors and managers are expected to identify training needs and opportunities for each staff and build training to enhance and enable career development into each employee’s performance profile. Because training and development is a continuing activity, this goal will be closed out for FY 25 and incorporated into Strategic Priority 5: Strategic Agency Goal 2. 			
Progress Update: July 2025			
<ul style="list-style-type: none"> SunLine University, in collaboration with Operations Management, developed a 10-hour training curriculum for both fixed route and paratransit controllers to strengthen their skills and abilities for decision-making, communication, and writing skills. The program is designed to provide the controllers the necessary skills to support professional growth and advancement into supervisory and management role. Training program began on July 1, 2025. SunLine selected PerformYard as its new performance management platform. Career development is built into the platform framework for each employee, and training initiatives and expectations will be identified and built into each employee’s performance profile beginning in 2026. 			

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- SunLine’s Board Clerk and Senior Administrative Assistant in the Clerk’s Office completed the necessary requirements for notary certification, and on July 15th, they were informed that they had successfully passed the written examination required for notary commissioning. Next steps include completing a background check and the Oath of Office via the County. This is a huge benefit to SunLine to have in-house notary services.

Progress Update: December 2024

- The apprenticeship and mentor programs will create opportunities for SunLine's front line operators and mechanics to earn college credits as they train for their positions, as well as better define opportunities for growth and promotion.
- Leadership and key technical staff (i.e. staff conducting DMV Examiner testing for Class B licenses, drug/alcohol reasonable suspicion evaluations) are highly encouraged and/or required to attend industry training and networking opportunities as part of their work plans and as resources allow in the budget. Attending these activities builds expertise, maintains current knowledge of industry issues, strengthens creativity and efficiency in problem solving, and/or meets legal or regulatory requirements.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.</p>			
<p>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.</p>			
F	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;">Secure and expand technical capacity and expertise within the agency</td> <td style="padding: 5px;">i. Continue to recruit and hire individuals with the necessary talent and expertise.</td> </tr> </table>	Secure and expand technical capacity and expertise within the agency	i. Continue to recruit and hire individuals with the necessary talent and expertise.
Secure and expand technical capacity and expertise within the agency	i. Continue to recruit and hire individuals with the necessary talent and expertise.		
Priority Owner: Tamara Miles	Department: Human Resources		
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____			
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27			
Progress Update: January 2026			
<ul style="list-style-type: none"> Human Resources successfully hired a Deputy Chief Financial Officer, a long-term vacancy. Human Resources continues to revise and improve its interview processes, onboarding and New Employee Orientation in partnership with Insight Strategies. This objective has been accomplished for the FY25, and the intent of this objective will be incorporated into FY26 Strategic Priority #5. 			
Progress Update: July 2025			
<ul style="list-style-type: none"> Human Resources successfully hired a Deputy Chief of Maintenance, a long-term vacancy. Partnered with professional recruitment firms (e.g., KL2 Connect) to identify and attract candidates for hard-to-fill executive and technical positions. SunLine coordinated/ participated in 6 on-site hiring events for Operators, as well as job fairs, community college outreach events, and workforce development programs to build a diverse candidate pipeline. Eight drivers were hired from these events. Established and strengthened community partnerships (e.g., with Desert Best Friend’s Closet, DBFC, and local workforce agency) to promote employment pathways and access for underrepresented groups. The agency has assisted DBFC with situational assessments, where DBFC clients are provided work tasks and assignments, and then evaluated on their performance to determine work readiness. 			
Progress Update: December 2024			
<ul style="list-style-type: none"> Staff continues to hire individuals thoughtfully with the necessary skills to deliver projects and programs to maintain and enhance service delivery. 			

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- Staff is developing mentorship programs for bus operators and mechanics which will better support the professional and emotional needs of new employees. In addition, mentorship programs frequently strengthen professional bonds/relationships, which improve retention, morale and skill levels as peers train, teach and exchange information with each other. Currently, the two hardest jobs to fill are operator and mechanic positions.
- Staff continues to explore retention strategies including alternative work schedules, child care support services through Tootris, professional growth training and networking opportunities through programs like Latinos in Transit and Women’s Transportation Seminar (WTS), etc.
- SunLine completed and implemented a compensation study (Board of Directors adopted in July 2024) to ensure competitiveness in salaries and benefits to support talent recruitment and retention.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: STRATEGIC PRIORITY 5: People and 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 level to meet the needs of our organization and customers effectively.</p>	
<p>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.</p>	
<p>F Secure and expand technical capacity and expertise within the agency</p>	<p>ii. Consider establishing and implementing a procedure to better evaluate and reward performance.</p>
<p>Priority Owner: Tamara Miles</p>	<p>Department: Human Resources</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p>	
<ul style="list-style-type: none"> Established a dedicated committee to identify business needs and vet potential vendors. Met with vendors and evaluated performance management platforms. Selected PerformYard as our performance management platform. Human Resources worked with PerformYard and Insight Strategies to define the platform requirements and ensure alignment with strategic business goals. Tailored features to SunLine’s needs. Sessions were held with employees to discuss the performance review process. Chiefs and management participated in training sessions with Insight Strategies. Mona and Chiefs collaborated with Insight Strategies to work on performance ratings calibration. Insight Strategies met with non-bargaining staff to cover the process for receiving feedback and understanding their final ratings. This objective has been accomplished for the FY25, and the intent of this objective will be incorporated into FY26 Strategic Priority #5. 	
<p>Progress Update: July 2025</p>	
<ul style="list-style-type: none"> SunLine began working on a Performance Management Renovation project with Insight Strategies in March 2025. The multi-disciplinary goal team reviewed several online performance management programs and selected PerformYard as the agency’s new performance management platform. The goal team has established the baseline performance management framework, content, ratings and competencies to be used to populate PerformYard. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- SunLine established the initial framework for other performance management tools, including a standardized format and process for developing Performance Improvement Plans (PIP) and employee development plans.

Progress Update: December 2024

- Staff is updating the performance review process and assisting individuals with developing clear work plans with measurable action items.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.	
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.	
STRATEGIC OBJECTIVES	PRIORITIES
A Maximize system safety to include physical and operational security and overall resilience	i. Establish a strategic plan for better defining actions and priorities that maximize system and workplace safety.
Priority Owner: Bryan Valenzuela	Department: Safety
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____	
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27	
Progress Update: January 2026	
<ul style="list-style-type: none"> Implemented Board-approve Public Transportation Agency Safety Plan (“PTASP”) per FTA Regulation 49CFR, part 673. Established Strategic Priority 5: Safety and Security for the FY 26 Strategic Plan. This Strategic Priority established guidance, direction and priorities governing the Safety Department’s initiatives beginning with the FY 26 Strategic Plan. Outcome and practices for this objective have been incorporated into the Safety Department’s standards of practice. This item shall be closed for the FY 25 Strategic plan and further actions shall be incorporated into the department’s strategic initiatives. 	
Progress Update: July 2025	
<ul style="list-style-type: none"> 100% of active fixed route fleet equipped with bus barriers as of March 2025. SunLine, in collaboration with CalHill Swift, conducted Reasonable Suspicion Drug and Alcohol Training for agency supervisors on October 31, 2024. Throughout FY25, the Safety Department worked with local jurisdictions (i.e. Sheriff's Office) to enforce the local ordinance 602 regarding loitering and trespassing at bus stops, substantially reducing occupation of the bus stops by the unhoused. 	
Progress Update: December 2024	
<ul style="list-style-type: none"> Staff is taking the updated Public Transportation Agency Safety Plan (PTASP) to the Board of Directors for approval in December 2024. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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.</p>	
<p>A Maximize system safety to include physical and operational security and overall resilience</p>	<p>ii. Ensure that executive management proactively engages employees and works to keep communication lines open.</p>
<p>Priority Owner: Mona Babauta</p>	<p>Department: Executive Leadership</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> The agency has implemented several initiatives to ensure that employees remain informed of important information regarding its activities and status, including the Transit Talk Newsletter, Quarterly Town Hall meetings for all staff, and the Snack Talk series in the Operations Department. Each department has the goal the of increasing communication, transparency and decision-making as part of the FY 26 Strategic Plan. Employees will be given the opportunity to participate in focus groups regarding the Rides Reimagined initiative in the January 2026 meetings the Jarett Walker and Associates. This objective has been accomplished, and further action and activities will be incorporated into departmental and personal goals and initiatives. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> The Operations Department is now conducting quarterly Snack Talks, where executive team members engage in meaningful conversations with operators, while sharing knowledge and updates. These Snack Talks provide open lines of communication to ensure line staff are made aware of important agency information. As part of the investigation process, representatives from the HR and Safety departments now interview each employee who submits an incident report alleging work-related injury. The intent is to identify the root-cause of the event to determine preventability and ensure remediation of hazardous conditions in the workplace. 	
<p>Progress Update: December 2024</p>	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- Development and implementation of a quarterly “Snack Talk”- a program that encourages positive interaction and communication between the executive team and front line employees in Operations. (December 2024).
- An RFP for an employee engagement application (“app”) will be issued soon to acquire a phone app to better communicate with all employees, especially those without SunLine email accounts.
- The Chief Maintenance Officer instituted monthly shop meetings to inform maintenance employees of SunLine's mission, goals, priorities, events, and celebrations.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 4: Safety and Security – Our 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.</p>	
<p>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.</p>	
A	<p>Maximize system safety to include physical and operational security and overall resilience</p>
<p>iii. Provide fuel type and bus familiarization training to local fire departments to improve response time for potential thermal events.</p>	
<p>Priority Owner: Bryan Valenzuela</p>	
<p>Department: Safety</p>	
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p>	
<ul style="list-style-type: none"> • The Safety Department is scheduling refresher training in April 2026, which will reinforce emergency response protocols and extend coverage to these additional areas. This upcoming training will involve multiple jurisdictions, not just Indio, ensuring a coordinated, regional approach to emergency preparedness across all relevant agencies. • Outcome and practices for this objective have been incorporated into the Safety Department’s standards of practice. This item shall be closed for the FY 25 Strategic plan and further actions shall be incorporated into the department’s strategic initiatives. 	
<p>Progress Update: July 2025</p>	
<ul style="list-style-type: none"> • The Safety Department conducted a walk-through of the Indio facility fueling infrastructure with the Indio Fire Department. The walk-through covered emergency shutdown procedures for the property and offered an opportunity to extend the training to other areas, such as the hydrogen infrastructure in Division I, to include emergency response procedures for thermal events on buses. 	
<p>Progress Update: December 2024</p>	
<ul style="list-style-type: none"> • On Tuesday, October 15, 2024, and Friday, October 18, 2024, SunLine in partnership with Nikkiso facilitated training with CalFire. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 4: Safety and Security – Our 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.</p>					
<p>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.</p>					
A	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;"> Maximize system safety to include physical and operational security and overall resilience </td> <td style="padding: 5px;"> iv. Partner with the Department of Homeland Security (DHS) to conduct an Infrastructure Vulnerability Assessment, which will assist in identifying, deterring, detecting, disrupting, and preparing for threats and hazards. </td> </tr> <tr> <td style="padding: 5px;"> Priority Owner: Bryan Valenzuela </td> <td style="padding: 5px;"> Department: Safety </td> </tr> </table>	Maximize system safety to include physical and operational security and overall resilience	iv. Partner with the Department of Homeland Security (DHS) to conduct an Infrastructure Vulnerability Assessment, which will assist in identifying, deterring, detecting, disrupting, and preparing for threats and hazards.	Priority Owner: Bryan Valenzuela	Department: Safety
Maximize system safety to include physical and operational security and overall resilience	iv. Partner with the Department of Homeland Security (DHS) to conduct an Infrastructure Vulnerability Assessment, which will assist in identifying, deterring, detecting, disrupting, and preparing for threats and hazards.				
Priority Owner: Bryan Valenzuela	Department: Safety				
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____					
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27					
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Staff continues to maintain close collaboration and in active communication with its TSA Representative to ensure alignment with federal security standards and guidance. Additionally, staff maintains ongoing contact with TSA to stay informed on national transit-related security concerns, emerging threats, and any new requirements, ensuring the agency remains proactive and compliant with federal security expectations. Outcome and practices for this objective have been incorporated into the Safety Department’s standards of practice. This item shall be closed for the FY 25 Strategic plan and further actions shall be incorporated into the department’s strategic initiatives. 					
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> On April 3, 2025, SunLine staff participated in the Rose Bowl Joint SWAT Training Exercise. SunLine established contact with the region’s TSA representative, who has agreed to assist in conducting a comprehensive Infrastructure Vulnerability Assessment at SunLine. 					
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> In progress 					

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 4: Safety and Security – Our 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.</p>					
<p>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.</p>					
A	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;"> Maximize system safety to include physical and operational security and overall resilience </td> <td style="padding: 5px;"> v. Develop training programs for staff that focus on de-escalation techniques and customer service skills. </td> </tr> <tr> <td style="padding: 5px;"> Priority Owner: Bryan Valenzuela </td> <td style="padding: 5px;"> Department: Safety </td> </tr> </table>	Maximize system safety to include physical and operational security and overall resilience	v. Develop training programs for staff that focus on de-escalation techniques and customer service skills.	Priority Owner: Bryan Valenzuela	Department: Safety
Maximize system safety to include physical and operational security and overall resilience	v. Develop training programs for staff that focus on de-escalation techniques and customer service skills.				
Priority Owner: Bryan Valenzuela	Department: Safety				
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____					
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27					
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> This goal has been completed, and a new goal has been established under Strategic Priority 4, Strategic Goal 1, regarding continuation training for new and current staff. Moving forward, the Safety Department will continue this training in in a different format, such as integration into new hire onboarding, annual safety training or refresher courses to maintain compliance and reinforce critical skills across the workforce. 					
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Crisis Awareness and De-escalation training, in accordance with FTA’s General Directive 24-1 began on May and continues through to August. Training is provided through Insight Strategies, the funding for which was approved in Committee in March 2025. 					
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> For the month of November, a total of 9 safety meetings will be held focusing on de-escalation techniques. The purpose of the training is to reduce violent acts and injuries, enhance safety, improve communication, build trust, and improve operational efficiency. In addition to de-escalation training, emergency response kits, including stop-bleeding kits with tourniquets, have been installed throughout SunLine. These kits could make the difference between life or death during active assailant situations. They enable immediate action to control severe bleeding, which is often the leading cause of preventable death in such scenarios. Quick access to these tools can significantly increase the chances of survival by stabilizing victims until professional medical help arrives. 					

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 4: Safety and Security – Our 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.</p>					
<p>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.</p>					
A	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;"> Maximize system safety to include physical and operational security and overall resilience </td> <td style="padding: 5px;"> vi. Invest in new technology to protect patrons, transit agency personnel, and critical assets directly or indirectly at all times. </td> </tr> <tr> <td style="padding: 5px;"> Priority Owner: Bryan Valenzuela </td> <td style="padding: 5px;"> Department: Safety </td> </tr> </table>	Maximize system safety to include physical and operational security and overall resilience	vi. Invest in new technology to protect patrons, transit agency personnel, and critical assets directly or indirectly at all times.	Priority Owner: Bryan Valenzuela	Department: Safety
Maximize system safety to include physical and operational security and overall resilience	vi. Invest in new technology to protect patrons, transit agency personnel, and critical assets directly or indirectly at all times.				
Priority Owner: Bryan Valenzuela	Department: Safety				
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____					
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27					
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Outcome and practices for this objective have been incorporated into the Safety Department’s standards of practice. This item shall be closed for the FY 25 Strategic plan and further actions shall be incorporated into the department’s strategic initiatives. 					
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> The facility camera upgrade project is underway with anticipated completion to finish in August 2025. The legacy two-way radio system in all paratransit and fixed route busses has been replaced with a new cellular based system. This upgrade provides increased range, clarity and reliability of communications, an accessibility. Staff in operations, safety, maintenance and stops & zones staff have handheld radio units to facilitate a more expedient response to activation on the bus. All fixed route and paratransit vehicles cellular routers have been replaced with upgraded 5g units. Replacement of the CAD/AVL system is both paratransit and fixed route vehicles is ongoing. Paratransit vehicles are scheduled for July installation and commissioning, followed by fixed route vehicles in October. The project involving the redesign of both North and South guard shack locations was out to bid in May 2025. Bids are due in July. Request for contractor award will be presented to the Board of Directors following confirmation of the winning bid. The pavement rehabilitation project is out to bid in July; anticipated presentation to the Board of Directors October 2025. 					
<p>Progress Update: December 2024</p>					

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- The video surveillance project is currently underway, aiming to significantly reduce the likelihood of illegal activities, such as asset theft. By implementing this project, SunLine intends to create a more secure and safe workplace environment for all employees. Ultimately, the enhanced security measures will foster a sense of safety and trust within the organization.
- Clever Devices was awarded a contract to replace SunLine's 30+ year old radio system. Full implementation should be completed by the end of CY 2024.
- Staff continues to work through the current solicitation process for a new CAD/AVL system, which will enhance system safety through real time vehicle tracking and improved communication with front line staff in the field.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 4: Safety and Security – Our 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.</p>					
<p>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.</p>					
A	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;"> Maximize system safety to include physical and operational security and overall resilience </td> <td style="padding: 5px;"> vii. Reinforce mitigating actions taken to reduce the likelihood and severity of consequences to individuals and transit agency assets. </td> </tr> <tr> <td style="padding: 5px;"> Priority Owner: Bryan Valenzuela </td> <td style="padding: 5px;"> Department: Safety </td> </tr> </table>	Maximize system safety to include physical and operational security and overall resilience	vii. Reinforce mitigating actions taken to reduce the likelihood and severity of consequences to individuals and transit agency assets.	Priority Owner: Bryan Valenzuela	Department: Safety
Maximize system safety to include physical and operational security and overall resilience	vii. Reinforce mitigating actions taken to reduce the likelihood and severity of consequences to individuals and transit agency assets.				
Priority Owner: Bryan Valenzuela	Department: Safety				
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____					
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27					
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> The comprehensive review and root-cause analysis process for reported industrial injuries has been fully implemented. HR, Safety, Maintenance, and Operations continue to collaborate through scheduled meetings to analyze causation, identify trends, and develop mitigation strategies. In-depth interviews with employees reporting injuries are now standard practice, and cross-departmental communication has improved significantly, resulting in more proactive safety measures. Agency-wide Crisis Awareness and De-escalation training began in May and was successfully completed in August as scheduled. All employees have now received this training, strengthening our ability to manage and reduce conflict situations effectively. Outcome and practices for this objective have been incorporated into the Safety Department’s standards of practice. This item shall be closed for the FY 25 Strategic plan and further actions shall be incorporated into the department’s strategic initiatives. 					
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> HR, Safety, Maintenance, and Operations established a multi-disciplinary and comprehensive review and root-cause analysis process for reported industrial injuries. The process involves conducting an in-depth interview with employees reporting injuries, regularly scheduled meetings to discuss causation, trends, and to plan mitigation and remediation actions to reduce incidence and severity of injuries. The meetings facilitate communication between the departments to discuss possible root causes, trends, etc. of the claims received. Crisis Awareness and De-escalation training all agency employees began on May and continues. Schedule completion of training is August. 					

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

As of March 17, 2025, the installation of bus barriers across SunLine’s fixed-route fleet is complete—100% of the active Fixed Route fleet is now equipped with protective barriers.

Progress Update: December 2024

- SunLine adopted a Passenger Code of Conduct in July 2024. The ordinance allows SunLine to suspend riding privileges for passengers who persistently violate its provisions, such as damaging property or assaulting transit workers. SunLine staff has been meeting bi-weekly to ensure all internal procedures are developed before the implementation of the ordinance, the tentative roll out date is January 5, 2025.
- Staff is complying with the Federal Transit Administration’s (FTA) expanded requirements to monitor, track and report on employee assaults during the course of business. This process should build greater awareness of employee assaults and the necessary actions for preventing them, which should work towards preventing/minimizing events and their severity.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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.</p>	
<p>A Maximize system safety to include physical and operational security and overall resilience</p>	<p>viii. Implement and/or update fleet and facilities maintenance plans as necessary and ensure that hydrogen fueling infrastructure and equipment are addressed.</p>
<p>Priority Owner: Mark Perry</p>	<p>Department: Maintenance</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Appointed a Deputy Chief of Fueling and Infrastructure to provide dedicated oversight, supervision and management for Utilities and the fueling maintenance team. Completed training for Utilities and Maintenance Staff on the LH2 station. PM program currently under review for all fueling stations. Recommendations expected January 31, 2026. Continued monitoring and reporting on this item shall transfer to the Maintenance Department under Strategic Priority 1: Service Reliability. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> SunFuels staff have been working alongside Integrated Cryogenic Solutions (ICS) staff to learn system and equipment maintenance, troubleshooting and repair procedures on the liquid hydrogen fueling station. This process will continue during the three year maintenance and operations period for the new station per the contact with ICS. SunFuels staff have been working closely with Nel Hydrogen & Cavendish staff in continued support of the electrolyzer fueling station. During FY25, the station has maintained and sustained the longest continuous operating state for fueling needs. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Current fueling infrastructure maintenance plans have been uploaded into Hexagon, SunLine’s new asset management system, which has been recently implemented. New LH2 station and electrolyzer plans are currently being incorporated into Hexagon so routine maintenance is completed on schedule. The latest equipment will be uploaded by February 2025. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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.</p>	
B	<p>Deliver reliable service</p>
<p>i. Create an effective, strategic fleet plan to ensure sufficient vehicles are available for daily pull-out.</p>	
<p>Priority Owner: Mark Perry</p>	
<p>Department: Maintenance</p>	
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p>	
<ul style="list-style-type: none"> • Realigned duties and responsibilities of maintenance mechanics and support staff to focus on priority maintenance and repairs. • Created SOP and revised preventative maintenance activities for priority mechanical systems (e.g. HVAC). • Maintenance mechanics have been or will be training on zero emissions vehicle maintenance and repair, resulting in 72% reduction in vehicle downtime. • Created and implemented a comprehensive Contingency Fleet Plan to ensure the agency has a ready and available pool of properly maintained vehicles that can be brought into service when needed. • Continued monitoring and reporting on this item shall transfer to the Maintenance Department under Strategic Priority 1: Service Reliability. 	
<p>Progress Update: July 2025</p>	
<ul style="list-style-type: none"> • Liquid hydrogen (LH2) station has passed the contractually required availability test and will soon be undergoing performance testing. Work continues at the LH2 station to pass the State’s HySTEP testing which will allow SunLine to sell hydrogen to the public. Upon passing the tests and inspections final acceptance will occur followed by project closeout. • The CNG buses acquired in early CY24 have been repainted and upfitted with driver barriers, radio systems, and updated routers. The buses are currently in-service and will be upfitted with the new CAD/AVL systems in October. 	
<p>Progress Update: December 2024</p>	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- An RFP for a comprehensive operational analysis (COA) will be released within the next month, which will include an analysis of current operations/ridership needs along with recommended system improvements. The associated strategic fleet plan for delivering service will be included in this work.
- Standard operating procedures (SOPs) are being developed to improve maintenance practices and policies for increasing fleet spares/availability.
- Construction of the new liquid hydrogen fueling station (Contractors: Dahl Taylor & Nikkiso) was completed late spring 2024 and became SunLine's primary and trusted fueling solution for the hydrogen fuel cell bus (FCB) fleet.
- CNG buses, purchased from Riverside Transit Agency (RTA) in early CY 2024, are being outfitted for service. These will eventually serve as SunLine's contingency/emergency fleet as hydrogen technology continues to evolve.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

This FY 2025 Goal supports the following from the FY '26 Strategic Plan: **Strategic Priority 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.

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.

B	Deliver reliable service		ii. Upgrade Scheduling Software (Trapeze) to increase staff planning and scheduling efficiencies.
----------	--------------------------	--	---

Priority Owner: Dylan Narz	Department: Operations
----------------------------	------------------------

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: _____

Goal status as of 6/30/26 Completed and closed In place/monitoring; expected closure: _____ In process/Continue to FY 27

Progress Update: January 2026

- Project has been completed and closed out.

Progress Update: July 2025

- Upgrade from Trapeze version 15 to 21 was completed on March 8, 2025. The upgrade was necessary because the vendor was no longer supporting v. 15.
- V21 allows for automated bidding for routes and shifts; expected to make the bidding process more efficient.

Progress Update: December 2024

- The Trapeze software upgrade from version 15 to 21 is in progress. Testing, training and implementation are scheduled to start in February 2025.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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.</p>	
<p>B Deliver reliable service</p>	<p>iii. Implement performance monitoring processes to improve service planning efforts.</p>
<p>Priority Owner: Greg Wildman</p>	<p>Department: Planning</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p>	
<ul style="list-style-type: none"> • Recent data collection efforts for Rides Reimagined have strengthened the coordination between SunLine staff responsible for performance reporting and analysis and have helped staff identify opportunities for improved data collection and analysis processes in the future. • The new CAD/AVL system will allow for more reliable & standardized collection of on-time performance data. 	
<p>Progress Update: July 2025</p>	
<ul style="list-style-type: none"> • The Board of Directors awarded a contract to GMV Synchronatics for a new CAD/AVL system. Installation of the new system is scheduled for paratransit vehicles in July 2025 and fixed route in October 2025. 	
<p>Progress Update: December 2024</p>	
<ul style="list-style-type: none"> • SunLine is now a member of the American Bus Benchmarking Group (ABBG) and required to collect, monitor, interpret and report performance metrics consistent with other member agencies. By benchmarking SunLine’s performance against others across the industry, staff will be better aware of areas for improvement and work proactively and collaboratively with others to solve operational challenges. • An RFP for an updated and/or new CAD/AVL system, which will allow SunLine to tighten operational efficiencies, monitor performance more closely, track buses in real time for safety and operational purposes, etc., was released in September 2024. Proposals should be received soon. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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.</p>	
<p>B Deliver reliable service</p>	<p>iv. Implement and/or better publicize customer information tools that communicate service availability/status to minimize wait and travel times.</p>
<p>Priority Owner: Edith Hernandez</p>	<p>Department:</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Swiftly is now adequately reporting to the SunLine website, and staff have been trained on how to enter detours and closures. This ensures dispatch and customer service can continue providing real-time bus information while we await full implementation of the GMV CAD/AVL system. This objective has been achieved. Further action will be taken by and reported by the responsible department. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> The deployment of Swiftly is nearly complete with the installation of new Cradlepoint hardware. Once complete, Swiftly will provide accurate GTFS-RT. Dispatch and customer service staff will use Swiftly to quickly identify bus locations in real time answering or providing information to customers. This is a temporary solution until such time that the GMV CAD/AVL is fully implemented successfully. SunLine has launched Transit Royale, an upgraded aspect of the Transit app, at no cost, to provide expanded information to Coachella Valley residents. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Staff is currently implementing partnerships with Swiftly and the Transit app to leverage best in class industry tools that will provide real time stop arrival and service interruption information to riders. Expected completion is March 2025. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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.</p>	
C	<p>Implement services with a focus on equity to increase access to opportunity for all Coachella Valley citizens</p>
<p>i. Better align SunLine’s various services and programs, including fixed route, paratransit, SunRide, and the taxi voucher program to minimize or eliminate mobility gaps and transit deserts in the Valley.</p>	
Priority Owner: Greg Wildman	Department: Planning
<p>Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: June 30, 2026</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input checked="" type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Through Rides Reimagined, Jarrett Walker and Associates are analyzing the performance of SunLine’s services, and consultants and SunLine staff are engaging with the public to understand the public’s needs and priorities related to transit investment. The outcome of Rides Reimagined will include recommendations that align SunLine’s family of services with the team’s analysis of SunLine’s performance, public input, available resources, and the professional expertise of the team. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> SunLine completed the RFP process to select a consultant to perform the Comprehensive Operational Analysis (COA). Staff selected Jarrett Walker Associates (JWA) and the SunLine Board of Directors approved this selection at the June 2025 Directors meeting. An On Board Ridership survey has been completed. SunLine received the final report in May 2025. The On Board Ridership survey contains demographic and trip data information that will be used for grant applications and long range planning. TMD, a national consulting company, has been working with the new scheduler to train and provide guidance on building efficient operator schedules. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> The upcoming COA process will support this objective as different solutions are analyzed and recommended for improving systemwide effectiveness. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- A ridership survey will be conducted soon and will better inform future decisions on how each of SunLine’s modes could be better aligned.
- Maintaining on-call planning firms “on the bench” will allow SunLine to expand its planning and scheduling capacity when necessary for exploring and/or implementing new, creative service solutions.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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.</p>	
<p>C Implement services with a focus on equity to increase access to opportunity for all Coachella Valley citizens</p>	<p>ii. Complete the Request for Proposals (RFP) process for microtransit (SunRide) services, and establish a service design that will increasingly meet community mobility needs, grow ridership, serve to reduce traffic congestion/harmful air emissions, increase cost and operational efficiencies, and improve competitiveness for grant funds.</p>
<p>Priority Owner: Greg Wildman</p>	<p>Department: Planning</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> As for Goal 2.i - through Rides Reimagined, Jarrett Walker and Associates are analyzing the performance of SunLine’s services, and consultants and SunLine staff are engaging with the public to understand the public’s needs and priorities related to transit investment. The outcome of Rides Reimagined will include recommendations that align SunLine’s family of services with the team’s analysis of SunLine’s performance, public input, available resources, and the professional expertise of the team. SunLine continues to refine the SunRide services provided by VIA to achieve its ridership goals. Ongoing monitoring and reporting of VIA performance and other system updates shall transfer to the Taxi Department. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> SunLine selected VIA to take over microtransit services. VIA began operation March 2025. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> An RFP was released in the fall of 2024 for microtransit (SunRide) services. The current contract with Yellow Cab will expire in March 2025, and proposals are currently being evaluated. A recommendation for contract award will be brought to the Board of Directors in January 2025. Potential transition to a new vendor would occur in April 2025. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>			
<p>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.</p>			
C	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;"> Implement services with a focus on equity to increase access to opportunity for all Coachella Valley citizens </td> <td style="padding: 5px;"> iii. Identify and explore transit models that complement SunLine’s fixed route system and improve mobility in low density communities. </td> </tr> </table>	Implement services with a focus on equity to increase access to opportunity for all Coachella Valley citizens	iii. Identify and explore transit models that complement SunLine’s fixed route system and improve mobility in low density communities.
Implement services with a focus on equity to increase access to opportunity for all Coachella Valley citizens	iii. Identify and explore transit models that complement SunLine’s fixed route system and improve mobility in low density communities.		
Priority Owner: Greg Wildman	Department: Planning		
Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input checked="" type="checkbox"/> In place/monitoring; expected closure: June 30, 2026			
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27			
Progress Update: January 2026			
<ul style="list-style-type: none"> As with Goal 2.i - through Rides Reimagined, Jarrett Walker and Associates are analyzing the performance of SunLine’s services, and consultants and SunLine staff are engaging with the public to understand the public’s needs and priorities related to transit investment. The outcome of Rides Reimagined will include recommendations that align SunLine’s family of services with the team’s analysis of SunLine’s performance, public input, available resources, and the professional expertise of the team. 			
Progress Update: July 2025			
<ul style="list-style-type: none"> COA to begin August 2025. 			
Progress Update: December 2024			
<ul style="list-style-type: none"> This will be included as part of the COA process, as well as the microtransit (SunRide) solicitation process. 			

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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.</p>	
<p>D Design, plan and implement capital investments that support operating needs</p>	<p>i. Implement an inclusive Capital Investment Planning (CIP) process that understands and supports current needs with an additional focus on long range agency goals.</p>
<p>Priority Owner: Walter Watcher</p>	<p>Department: Capital Projects</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Prioritized Capital projects have been funded in the FY 26 budget. CIP process to compete in January 2026. Funding analysis to be conducted during FY 27 budget planning. Further reporting on this priority will be transferred to the Capital Projects Department. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Staff identified and requested capital items to be included in the FY 26 capital budget. This list was reviewed and ranked by the Chiefs. The final list was used to build the upcoming capital budget. This process is expected to occur on an annual basis. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> The Chief Planning Officer implemented a Capital Investment Program in collaboration with other department leaders and stakeholders to identify current and future capital needs. Hexagon, SunLine’s new asset management software, will further allow staff to monitor both near and long term capital asset maintenance and replacement needs. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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.</p>	
<p>D Design, plan and implement capital investments that support operating needs</p>	<p>ii. Continue progress towards completion of SunLine’s \$100 million+ capital program that includes fleet replacements, new hydrogen stations in Thousand Palms and Indio, a workforce training center (former West Coast Center of Excellence), utility improvements, a microgrid, replacement of the radio system, upgrade to scheduling software (Trapeze), etc.</p>
<p>Priority Owner: Walter Watcher</p>	<p>Department: Capital Projects</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> The agency acquired 8 fuel cell buses as of January 2025. Radio replacement project completed Contract awarded for the upgrade to scheduling software in December 2025. Hydrogen station in Thousand Palms has been in service since August 2024. Utility improvements underway for the Indio station. WTC – A&E Completed. Break ground expected summer 2026. Completion expected end 2027. Further reporting this item will be the responsibility of the Capital Projects department. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Eight new Fuel Cell buses were placed into service by end of calendar year 2024. Additional units will be ordered in FY26 in line with approved capital budgets. Staff provided plans and paid preliminary engineering fees to IID to meet fueling station power requirements for the Indio fueling station. Awaiting preliminary engineering review and contact to bring another circuit to the Indio facility. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- The Board of Directors awarded a contract for A&E services for the Workforce Training Center. Staff is working with the firm for site plans, building plans and County approval. Bids will be issued upon plan approval.
- New cellular-based radio system has been fully installed, commissioned and is in use.
- Staff continues to work with ARCHES in anticipation of receiving funding for upcoming bus purchases and Indio fueling station construction.

Progress Update: December 2024

- Agency priorities have been identified and work has begun on large projects.
 - Fleet replacement is underway and will continue in step with new planning documents.
 - Indio utility and fueling station work is underway for completion in 2027.
 - Workforce development building engineering procurement is near release goal is start construction August 2025.
 - Radio system installation will be complete by end of 2024.
- The recent ARCHES grant award will also support replacement of CNG buses with hydrogen fuel cell buses and the potential construction of a third liquid hydrogen station.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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.</p>	
<p>E Coordinate with regional transportation planning/funding agencies and service providers to maximize seamlessness of travel for local citizens and visitors</p>	<p>i. Participate in planning efforts with cities, county representatives, and/or regional planners on multi-modal transportation hubs and other mobility programs that serve to reduce single occupancy vehicle trips and traffic congestion.</p>
<p>Priority Owner: Greg Wildman</p>	<p>Department: Planning</p>
<p>Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input checked="" type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> SunLine has contracted with Transpo Group to help build staff capacity to respond to jurisdictional partner requests for transit infrastructure and services. In 2025, the SunLine team participated in planning efforts involving the Coachella light rail station, as well as with the planning for a transit center in DHS. This is an ongoing activity and further reporting of the activities associated with this priority shall be through the Planning Department goals. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> The Planning staff continues to meet with area planning departments to stay informed of ongoing projects and sharing upcoming projects at SunLine. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> The CFO has increased his participation in regional planning meetings including RCTC, CVAG, CTA, SCAG, legislators and city officials throughout multiple meetings through the first part of FY25. The Chief Planning Officer/Planning staff have started engaging with local municipalities to identify opportunities for collaboration on projects and programs to improve travel and access to transit throughout the Valley. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>					
<p>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.</p>					
E	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;"> Coordinate with regional transportation planning/funding agencies and service providers to maximize seamlessness of travel for local citizens and visitors </td> <td style="padding: 5px;"> ii. Participate in Coachella Valley Rail (CV Rail) station area planning efforts as appropriate for maximizing potential, future synergies between rail and bus transit. </td> </tr> <tr> <td style="padding: 5px;"> Priority Owner: Greg Wildman </td> <td style="padding: 5px;"> Department: Planning </td> </tr> </table>	Coordinate with regional transportation planning/funding agencies and service providers to maximize seamlessness of travel for local citizens and visitors	ii. Participate in Coachella Valley Rail (CV Rail) station area planning efforts as appropriate for maximizing potential, future synergies between rail and bus transit.	Priority Owner: Greg Wildman	Department: Planning
Coordinate with regional transportation planning/funding agencies and service providers to maximize seamlessness of travel for local citizens and visitors	ii. Participate in Coachella Valley Rail (CV Rail) station area planning efforts as appropriate for maximizing potential, future synergies between rail and bus transit.				
Priority Owner: Greg Wildman	Department: Planning				
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____					
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27					
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Key members of the SunLine team participated in a planning meeting with the City of Coachella and others involved in the Coachella light rail station update. The Planning Department created and distributed a list of preferred development standards for rail stations and other transit center projects to enable it to provide safe, effective and efficient transit services. This initiative shall be incorporated into the Planning Department’s goals. Further reporting on this item shall be the responsibility of the Planning Department. 					
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Staff will continue to attend meetings on CV Rail. 					
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Staff are participating in station area planning meetings in Indio and Coachella 					

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
STRATEGIC OBJECTIVES	PRIORITIES
<p>A Conduct regular long-range financial planning exercises</p>	<p>i. Develop and annually update a 10-year Budget Outlook that incorporates reserve allocations, capital investments necessary for system safety and reliability, and operating expenses for meeting growing community needs.</p>
<p>Priority Owner: Luis Garcia</p>	<p>Department: Finance</p>
<p>Progress Update: January 2026</p>	
<p>Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input checked="" type="checkbox"/> In place/monitoring; expected closure: <u>6/30/2026</u></p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> A draft version of the total 10-year projections of revenues and expenses has been completed and will be reviewed and finalized in January 2026. Further initiatives related to long-term financial projections will be reported under the objectives and goals for that department under Strategic Priority 6. Resource acquisition, allocation and management (RAAM), and in conjunction with other departments. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Substantial progress has been made with the 10-year plan. Revenues and subsidies are being finalized and expenses will be completed to complete the plan by January 2026. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> SunLine's Financial Analyst has been tasked with developing an initial 10-year budget outlook. This will eventually inform decisions on the annual fiscal year operating and capital budget process. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>			
<p>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).</p>			
A	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; border-right: 1px solid black; padding: 5px;"> Conduct regular long-range financial planning exercises </td> <td style="padding: 5px;"> ii. Develop an annual budget that aligns with long-term budget projections and known funding resources. </td> </tr> </table>	Conduct regular long-range financial planning exercises	ii. Develop an annual budget that aligns with long-term budget projections and known funding resources.
Conduct regular long-range financial planning exercises	ii. Develop an annual budget that aligns with long-term budget projections and known funding resources.		
Priority Owner: Luis Garcia	Department: Finance		
Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input checked="" type="checkbox"/> In place/monitoring; expected closure: June 30, 2026			
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27			
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> The FY27 budget process will commence in January 2026 and will utilize the information provided from the 10-year budget outlook. Further initiatives related to the utilization of long-term financial projections into yearly budgets will be reported under the objectives and goals for that department under Strategic Priority 6. Resource acquisition, allocation and management (RAAM), and in conjunction with other departments. 			
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Staff in Planning, Finance and Capital Projects continue to finalize processes around this. 			
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> The Chief Planning Officer is taking steps to improve the capital planning process. Once a long-term capital and operating/service plan is developed, it will serve as a basis for the 10-year budget outlook for capital and operating expense assumptions. This effort will extend through FY26 where the plan will be completed and will then be used for the FY27 budget process. 			

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>			
<p>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).</p>			
A	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;"> Conduct regular long-range financial planning exercises </td> <td style="padding: 5px;"> iii. Regularly analyze SunLine’s compliance with mandates around farebox recovery ratios and caps in annual cost increases in order to maintain eligibility for TDA and STA funds. (Note: SunLine’s compliance with these mandates are also important for the continued, annual allocation of 10% of STA funds to CV Rail.) </td> </tr> </table>	Conduct regular long-range financial planning exercises	iii. Regularly analyze SunLine’s compliance with mandates around farebox recovery ratios and caps in annual cost increases in order to maintain eligibility for TDA and STA funds. (Note: SunLine’s compliance with these mandates are also important for the continued, annual allocation of 10% of STA funds to CV Rail.)
Conduct regular long-range financial planning exercises	iii. Regularly analyze SunLine’s compliance with mandates around farebox recovery ratios and caps in annual cost increases in order to maintain eligibility for TDA and STA funds. (Note: SunLine’s compliance with these mandates are also important for the continued, annual allocation of 10% of STA funds to CV Rail.)		
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;">Priority Owner: Luis Garcia</td> <td style="padding: 5px;">Department: Finance</td> </tr> </table>		Priority Owner: Luis Garcia	Department: Finance
Priority Owner: Luis Garcia	Department: Finance		
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____			
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27			
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> SunLine remains in compliance with TDA farebox recovery goals, as long as local Measure A funds can still be accessed by SunLine for operating expenses. Further initiatives related to compliance with TDA farebox recovery goals will be reported under the objectives and goals for that department under Strategic Priority 6. Resource acquisition, allocation and management (RAAM). 			
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> SunLine remains in compliance with TDA farebox recovery goals, as long as local Measure A funds can still be accessed by SunLine for operating expenses. 			
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Ongoing 			

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>			
<p>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).</p>			
A	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; border-right: 1px solid black; padding: 5px;"> Conduct regular long-range financial planning exercises </td> <td style="padding: 5px;"> iv. Improve SunLine’s Key Performance Indicator (KPI) program to provide a suite of KPIs that aid in long range planning rooted in data. </td> </tr> </table>	Conduct regular long-range financial planning exercises	iv. Improve SunLine’s Key Performance Indicator (KPI) program to provide a suite of KPIs that aid in long range planning rooted in data.
Conduct regular long-range financial planning exercises	iv. Improve SunLine’s Key Performance Indicator (KPI) program to provide a suite of KPIs that aid in long range planning rooted in data.		
Priority Owner: David Legaretta	Department: Finance		
Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input checked="" type="checkbox"/> In place/monitoring; expected closure: June 30, 2026			
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27			
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> The agency began addressing the ABBG list of metrics and KPI’s for decision-making, as well as calculations for each metric along with their respective definitions. The agency is assessing which of the metrics are most relevant for SunLine to incorporate in its financial planning. Analysis of existing metrics in conjunction with the ABBG can be useful to identify potential or unforeseen or concerning trends. 			
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Staff in all departments continue to refine appropriate KPIs and monitoring processes to inform long range planning, as well as day-to-day decision making. 			
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Beginning in December 2024, staff will begin building a KPI dataset that incorporates the ABBG data collection and reporting guidelines. These outputs will be accessible to staff for review when making business decisions. 			

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
<p>B Regularly review the reserve policy and grow reserves responsibly</p>	<p>i. Continue to allocate a sufficient amount to the SunLine reserve to meet critical needs in the future.</p>
<p>Priority Owner: Luis Garcia</p>	<p>Department: Finance</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Staff continued to assess need and allocate available funding to its reserves held at RCTC. Further initiatives related to the allocation of funding to SunLine’s reserves will be reported under Strategic Priority 6. Resource acquisition, allocation and management (RAAM). 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> The FY26 budget was approved by the Board of Directors which balanced revenues and expenses without utilizing reserves. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Ongoing 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
<p>C Establish a fare structure that allows SunLine to improve and expand service</p>	<p>i. Conduct a fare payment study and cost recovery analysis.</p>
<p>Priority Owner: Greg Wildman</p>	<p>Department: Planning</p>
<p>Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: June 30, 2027</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input checked="" type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Staff began the work on the COA, however, discussions surrounding the fare study are scheduled later in the 18-month COA process. Staff will seek direction from the Board on the need and timing of a potential fare study analysis. Further initiatives related to the fare study will be reported under Strategic Priority 6. Resource acquisition, allocation and management (RAAM). 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> The Board of Directors approved the award of a contract for the COA study at the June 2025 meeting. The contract includes an option for a fare study analysis. However, a fare policy study as part of the COA is an optional item. Staff will seek direction from the Board on the need and timing of a potential fare study analysis. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> This will be included in the COA. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
<p>C Establish a fare structure that allows SunLine to improve and expand service</p>	<p>ii. Take measured steps to amend the fare structure as necessary for the Agency’s long term sustainability.</p>
<p>Priority Owner: Luis Garcia</p>	<p>Department: Finance</p>
<p>Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input checked="" type="checkbox"/> In place/monitoring; expected closure: June 30, 2027</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> The amendment to the fare study is predicated on the results of the fare study under Goal 3, C.i. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> A fare policy study is part of the COA as an optional item. The agency will need to decide whether to exercise this option in collaboration with the Board of Directors. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Ongoing and will be considered as part of an upcoming Short Range Transit Planning process. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
<p>D Monitor and plan for funding/regulatory decisions by regional planning/funding/regulatory agencies</p>	<p>i. Monitor county, state and federal allocations/projections from the Riverside County Transportation Commission (RCTC) and include these in the annual budget and 10-year Budget Outlook.</p>
<p>Priority Owner: Luis Garcia</p>	<p>Department: Finance</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Monitoring public funding is an institutionalized process within the finance department and continues to seek guidance from legislative advocacy firms to support the continuation of transit funding. Further initiatives related to the monitoring of county, state and federal allocations/projections from RCTC will be reported under Strategic Priority 6. Resource acquisition, allocation and management (RAAM). 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Staff continues to monitor allocations and projections from funding partners. These updates have been incorporated from yearly formal updates in public meetings as well as monthly staff updates to funding provide to SunLine’s Finance Department. With the assistance of legislative advocacy firms, staff has been supporting the continuation of transit funding at the State and Federal level with programs such as Cap and Trade/ Cap and Invest and the reauthorization/replacement of the IJJA. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Ongoing 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
<p>D Monitor and plan for funding/regulatory decisions by regional planning/funding/regulatory agencies</p>	<p>ii. Monitor decision/actions by the Federal Transit Administration (FTA), California Air Resources Board (CARB), Southern California Association of Governments (SCAG) and other agencies that impact SunLine’s long-term sustainability and ability to serve Coachella Valley Communities’ evolving mobility needs.</p>
<p>Priority Owner: Luis Garcia</p>	<p>Department: Finance</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Due to efforts surrounding a broader inclusion and expectation of the executive team, staff have developed a more in-depth understanding of the importance of monitoring and understanding regulatory agency activity, and developing appropriate responses. Responsibility for continued monitoring of regulatory agency activity will fall upon the departmental executive to be aware and take appropriate action. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> SunLine successfully met the FTA’s required deadline for developing and submitting its risk assessment, which was submitted on December 4, 2024. The following mitigation measures have been fully implemented: <ul style="list-style-type: none"> Driver Barriers De-Escalation Training Policies and Procedures Video Surveillance Systems NTI Assault Awareness and Prevention Training 10-54 Button (Silent Alarm) 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- Future mitigation strategies are also identified as follows:
 - Enhanced De-Escalation Training
 - B.O.L.O. (Be on the look-out) Flyer for Communication
 - Public Awareness Campaign

The Federal Transit Administration (FTA) has issued a requirement for an update to be submitted to the National Transit Database (NTD) by August 29, 2025. SunLine is currently on track to meet this deadline.

- In conjunction with legislative advocacy firms, SunLine staff constantly monitors key funding and operational decisions made that could impact the Agency.

Progress Update: December 2024

- FTA General Directive 24-1, Required Actions Regarding Assaults on Transit Workers, was issued last month and will require more than 700 transit agencies nationwide to take action to protect frontline transit workers from the risk of assaults. SunLine is on track to submit the required risk assessment before the deadline of December 26, 2024.
- Monitoring decisions/actions for financial planning and operating purposes is ongoing.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
<p>D Monitor and plan for funding/regulatory decisions by regional planning/funding/regulatory agencies</p>	<p>iii. Research and pursue competitive grant opportunities and/or earmarks for meeting capital investment, workforce development, safety/security, and service enhancement initiatives.</p>
<p>Priority Owner: Luis Garcia</p>	<p>Department: Finance</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> SunLine engaged a grant writing firm to improve the understanding the breadth of available grants as well as improve the quality of grant submissions. Through the new firm, staff participates in monthly meetings to review new grant opportunities and establish timelines for potential grant submittals. SunLine is currently working on a competitive grant for the CEC to fund the hydrogen station in Indio. Maximizing the amount of competitive awards is critical to the success of SunLine’s priorities and further initiatives related grant opportunities will be reported under Strategic Priority 6. Resource acquisition, allocation and management (RAAM). 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> SunLine submitted Federal earmark requests for funding related to the replacement of the maintenance facility and for CMAQ funding for expanded solar-covered parking for staff and Agency support vehicles. SunLine will also be submitting grants for the Bus and Bus Facility and Low or No Emission funding opportunity. Staff is currently working with the California Department of Transportation to execute the master agreement for TIRCP grant funds for an open loop, contactless payment system while concurrently conducting the procurement process to determine potential vendors. The master agreement must be completed prior to awarding a vendor contract. 	
<p>Progress Update: December 2024</p>	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- In October, 2024, the State awarded \$612,000 in Transit and Intercity Rail Capital Program (TIRCP) funds to SunLine for a contactless, open loop fare payment system in partnership with the California Integrated Travel Project (Cal-ITP).
- Staff is soliciting proposals for grant writing support and advocacy services in Sacramento and Washington.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
<p>D Monitor and plan for funding/regulatory decisions by regional planning/funding/regulatory agencies</p>	<p>iv. Establish and actively manage a state and federal legislative program with engagement from the Board of Directors to advocate for SunLine’s needs, as well as to increase awareness of potential financial impacts from new mandates.</p>
<p>Priority Owner: Edith Hernandez</p>	<p>Department: Legislative Affairs</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Since July 2025, SunLine has continued advancing its state and federal advocacy efforts. Staff promoted an internal team member to Board and External Affairs Coordinator to assist in the Legislative Affairs Office. With support from SunLine’s state advocacy team, staff have submitted letters of support for several bills and provided in-person tours for two Assemblymembers in the summer of 2025. Additionally, staff coordinated virtual meetings with federal leaders to further SunLine’s priorities and strengthen relationships in Washington, D.C. This activity has been institutionalized and will be reflected in personal and/or departmental goals. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Through the assistance of legislative advocacy firms, staff has been supporting the continuation of transit funding at the State and Federal level with proposed programs such as Cap and Invest and continued funding levels established by the IJA. The Board of Directors approved the State and Federal Legislative Program at the March 2025 Directors Meeting. The 2025 state and federal legislative program was finalized and approved by the Board of Directors in March 2025. In June 2025, the Board of Directors was briefed on staff decisions on state and federal advocacy firms to elevate SunLine’s visibility and strengthen its voice in Sacramento and Washington, D.C . 	
<p>Progress Update: December 2024</p>	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- SunLine created a Director of Board and Legislative Affairs position to actively monitor legislative and regulatory activities at the state and federal level, as well as build stronger relationships with local, regional, state and federal representatives.
- Monthly legislative updates are provided to the Board of Directors during regular meetings.
- Staff conducted an advocacy trip to Sacramento in August 2024.
- Staff is presenting a draft Legislative Program to the Board of Directors for discussion in December 2024.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
<p>E Strengthen SunLine’s technology backbone and cybersecurity systems for maximizing organizational performance, access to information, and agency health</p>	<p>i. Implement new hardware, software and associated O&M processes/procedures for ensuring that SunLine’s information technology (IT) and information systems (IS) foundation remains stable, reliable, secure, and capable of meeting evolving operating and reporting needs.</p>
<p>Priority Owner: Ray Stevens</p>	<p>Department: Finance/Procurement/IT</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> • Initial assessment, road map, Windows 10, e-waste unusable and cradle point upgrades complete (RS). 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> • Helixstorm delivered the initial assessment to IT staff with a subsequent presentation delivered to the IT Steering Committee last quarter 2025. • A roadmap of projects to improve network and system performance, increase security posture, focus on cloud based technologies, and simplify systems was developed with focus on server infrastructure, internet high availability, and Entra for Microsoft365 as initial priorities November 2024. • Helixstorm triaged certain of the initial end user issues related to Exchange Server migration, significantly improving Microsoft application functionality. • There is an ongoing project migrating employees computers from Windows 10 to Windows 11 to align with the Microsoft requirements; completion expected October 2025. • Disposed unusable equipment, greatly improving system security. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- New cradle points and antennas had to be installed on the fleet to ensure that bus technology such as radios, CAD/AVL, as well as Swiftly and the Transit App, function properly and accurately. This project started in FY 2025, and it continues into FY 2026.

Progress Update: December 2024

- SunLine hired a new IT firm (Helixstorm) to improve SunLine's IT system functions and reliability. Helixstorm will complete its initial assessment in the first quarter of FY25.
- In November 2024, Helixstorm was onboarded and a new IT help desk ticketing system was implemented. The increased resources will improve internal customer service for IT support.
- The CFO and Deputy of General Services will oversee the contract with Helixstorm and are triaging the most urgent priorities for SunLine.
- An IT steering committee has been created as a result of a recommendation from Helixstorm. The purpose of the committee will be to ensure ongoing collaboration between SunLine Transit Business Units and Helixstorm. The business units will drive the actions needed out of IT.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
<p>E Strengthen SunLine’s technology backbone and cybersecurity systems for maximizing organizational performance, access to information, and agency health</p>	<p>ii. Secure necessary expertise for maintaining SunLine’s IT and IS foundation.</p>
<p>Priority Owner: Ray Stevens</p>	<p>Department: Finance/Procurement/IT</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> • Helixstorm advisory service agreement executed, weekly staffing report outs recurrence in place supplemented w/ training goals (RS). 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> • The managed services agreement with Helixstorm was expanded to provide for strategic advisory services. • The assigned advisor crafted a development plan for internal IT staff, provided coaching to the staff to report wins, challenges, and blockers in a structured manner as well as establishing IT support and performance metrics. • IT independent contractor agreement was extended to enable additional knowledge transfer opportunities. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> • SunLine hired Helixstorm to improve SunLine’s IT system functions and reliability. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
<p>E Strengthen SunLine’s technology backbone and cybersecurity systems for maximizing organizational performance, access to information, and agency health</p>	<p>iii. Accumulate a global perspective of SunLine’s IT systems and develop a plan to replace equipment and begin the migration of systems to the cloud.</p>
<p>Priority Owner: Ray Stevens</p>	<p>Department: Finance/Procurement/IT</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> • Barracuda messaging services, implementation of DNS filtering & Entra project complete (RS). 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> • Barracuda messaging archival services was migrated to the cloud June 2025. • Implemented DNS Filter for employee web filtering (cloud based) increasing system security. • Microsoft Entra project in progress and should complete by August 2025; full migration to Microsoft365 for electronic mail, teams, and one drive; RFP for second phase will begin July 2025. Expected completion November 2025. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> • Staff is currently exploring and planning the implementation of cloud based systems. Disaster recovery processes are also being prioritized. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
<p>E Strengthen SunLine’s technology backbone and cybersecurity systems for maximizing organizational performance, access to information, and agency health</p>	<p>iv. Complete implementation of new maintenance/inventory warehouse software, Hexagon Enterprise Asset Management (EAM), and implement new processes to improve inventory efficiency and management of capital assets.</p>
<p>Priority Owner: Ray Stevens</p>	<p>Department: Finance/Procurement/IT</p>
<p>Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input checked="" type="checkbox"/> In place/monitoring; expected closure: August 2026</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Hexagon EAM parts catalog implementation delayed as result of internal resource constraint. Expected to be supplemented with Temp help during calendar year Q1-Q3 (RS). Work continues on this process; item closed for this FY 25 reporting and transferred to the Finance Department Operational Goals for the remainder of FY 26 and into FY 27. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> 95% Implementation complete 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Hexagon EAM has been implemented and is currently being utilized by Maintenance and in the inventory warehouse. Additional training in Hexagon is being planned. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 6: Resource Acquisition, Allocation, & 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 in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.</p>	
<p>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).</p>	
<p>E Strengthen SunLine’s technology backbone and cybersecurity systems for maximizing organizational performance, access to information, and agency health</p>	<p>V. Complete outsource of payroll processing to ADP.</p>
<p>Priority Owner: Luis Garcia</p>	<p>Department: Finance</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> SunLine fully transitioned to ADP in May 2025. ADP transition project is completed. Ongoing monitoring and updates transitioned to the performance standards established for the Finance Department. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> The transition to ADP occurred in May 2025. Staff continues to implement new ADP features for employees to improve access to information and reporting. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> The project is undergoing final validation and training for go-live crossover to align with the new calendar year and first payment out of ADP projected in January 2025. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.			
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			
STRATEGIC OBJECTIVES		PRIORITIES	
A	Maintain awareness of local needs		i. Continue public outreach efforts to gather public feedback on mobility needs.
Priority Owner: Edith Hernandez		Department: Marketing/Legislative Affairs	
Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input checked="" type="checkbox"/> In place/monitoring ; expected closure: June 30, 2026			
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27			
Progress Update: January 2026			
<ul style="list-style-type: none"> Staff has increased travel training efforts and has been proactively reaching out to community organizations to schedule sessions. The Marketing Department is also in the process of updating the travel training presentation and related materials to better support and educate the community on SunLine’s services. 			
Progress Update: July 2025			
<ul style="list-style-type: none"> Staff continues proactive outreach to established community organizations to schedule presentations and gather feedback. Marketing is expanding travel training efforts to better support and educate the community on using SunLine’s services. The Marketing Department updated collateral materials. 			
Progress Update: December 2024			
<ul style="list-style-type: none"> Staff continues to actively reach out to established community organizations to schedule presentations and feedback forums. 			

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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</p>	
<p>A Maintain awareness of local needs</p>	<p>ii. Conduct outreach to local city officials for feedback on local needs.</p>
<p>Priority Owner: Edith Hernandez</p>	<p>Department: Legislative Affairs</p>
<p>Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input checked="" type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> • SunLine continues proactive outreach to local elected officials and community organizations to gather feedback on community needs, encourage visits to SunLine, and enhance the agency’s visibility while promoting a better understanding of transit priorities and operations. This activity has been institutionalized and will be reflected in personal and/or departmental goals. A more specific SMART goal will be written for the FY27 strategic plan. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> • SunLine has scheduled meetings and initiated outreach with local elected officials, including members of the state legislative delegation, to gather feedback on community needs and encourage visits to SunLine for a better understanding of transit priorities and operations. • See also G2. A. i. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> • Staff has had regular meetings with officials in various cities related to infrastructure investments (i.e. construction of transit centers), enforcing “No Trespassing” regulation at bus shelters, service needs, clean air/healthy community investments, CV rail planning, etc. • Regular meetings with local leaders/policy makers/legislators and/or their staffs to share local transit needs from SunLine’s perspective, and to better understand from them local priorities, available funding and partnership resources, etc. • SunLine’s Director of Legislative Affairs has been meeting with local Public Information Officers to establish regular, open lines of communications. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.	
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	
A Maintain awareness of local needs	iii. Conduct ridership surveys.
Priority Owner: Greg Wildman	Department: Planning
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____	
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27	
Progress Update: January 2026	
<ul style="list-style-type: none"> A community survey is currently underway through Rides Reimagined. This survey asks participants about their experience and barriers to using transit. Another community survey asking about priorities for transit investment will be conducted later in the year as well. Staff continue to review the Rate-my-ride feature on the Transit App and respond accordingly. 	
Progress Update: July 2025	
Staff received training on the Transit app Rate-My-Ride data where we will have access to crowd sourced information about our service, stop infrastructure, and buses. This will be helpful for decision making around service improvements.	
<ul style="list-style-type: none"> SunLine will implement regular Customer Satisfaction Survey. The next Customer Satisfaction Survey will occurs in the spring, usually around April. 	
Progress Update: December 2024	
<ul style="list-style-type: none"> Ridership surveys will be conducted continuously using the Transit app survey feature for real time feedback from riders. Annually, SunLine will participate in the ABBG Customer Satisfaction Survey. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.	
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	
A Maintain awareness of local needs	iv. Complete On Board Ridership Survey Study. (Previous survey completed in 2019.)
Priority Owner: Greg Wildman	Department: Planning
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____	
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27	
Progress Update: January 2026	
<ul style="list-style-type: none"> Onboard ridership survey conducted in March 2025. Report out pending. Further reporting for this issue will be the responsibility of the Planning Department. 	
Progress Update: July 2025	
<ul style="list-style-type: none"> The On Board Ridership Survey was completed. Final report was received May 2025. Next steps are being defined, and a presentation to the Board will be planned before the end of the calendar year. 	
Progress Update: December 2024	
<ul style="list-style-type: none"> On-board rider survey RFP was released in September 2024. Community outreach and survey process should begin by March 2025. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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</p>	
A	<p>Maintain awareness of local needs</p>
<p>v. Establish Rider Advocacy/Advisory Committee(s) as appropriate for better understanding ridership needs.</p>	
<p>Priority Owner: Edith Hernandez</p>	
<p>Department: Legislative Affairs</p>	
<p>Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input checked="" type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p>	
<ul style="list-style-type: none"> • Staff updated the SunLine website and continues to promote the Accessibility Committee to the community to attract members. The Clerk’s Office has implemented a consistent and streamlined process for meetings, aligned with the Board meeting structure to ensure compliance with the Brown Act. Updates to the by-laws are still in progress to further enhance collaboration and address community needs. • Develop ability through the ADA Eligibility Group to assume responsibility for this activity and to promote and manage the Advocacy/Advisory Committee independently. 	
<p>Progress Update: July 2025</p>	
<ul style="list-style-type: none"> • Staff is in the process of developing updated by-laws to refresh the current Accessibility Committee that is an advisory committee to the Board for improving collaboration and staff awareness of community needs, ADA issues, as well as other service interests/needs. This process will also include creating the appropriate forums for clearly addressing needs/ interests around paratransit, fixed route, and microtransit in collaboration with community stakeholders. 	
<p>Progress Update: December 2024</p>	
<ul style="list-style-type: none"> • An existing ACCESS Advisory Committee to the Board continues to meet bimonthly. Although this committee is tasked with looking at the entire SunLine system inclusive of fixed route and paratransit, it is focused primarily on ADA/paratransit related services. • An effort is underway to separate the current ACCESS advisory committee into two committees that will focus on fixed route and paratransit separately. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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</p>	
<p>B Communicate on SunLine’s organizational health and sustainability</p>	<p>i. Provide regular “state of the agency” presentations and/or reports to key community stakeholders to communicate SunLine’s ability to continue to meet local mobility needs.</p>
<p>Priority Owner: Edith Hernandez</p>	<p>Department: Legislative Affairs</p>
<p>Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input checked="" type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> This activity has been institutionalized and will be reflected in personal and/or departmental goals. A more specific SMART goal will be written for the FY27 strategic plan. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> SunLine delivered “state of the agency” presentations to local Rotary clubs and organizations such as Leadership Coachella Valley to increase awareness of SunLine’s services and highlight its commitment to meeting local mobility needs. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Plans to create an annual report on SunLine’s performance and accomplishments are underway. Delivery is dependent on resource availability. In the meantime, staff will provide regular reports to the Board and/or on the website on Key Performance Indicators (KPIs) and progress made on projects/programs that are critical to SunLine’s service reliability, safety, etc. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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</p>	
<p>C Re-evaluate SunLine’s brand strategies</p>	<p>i. Engage local cities on bus stop investments, public signage and customer amenities to improve public perception and system appeal.</p>
<p>Priority Owner: Greg Wildman</p>	<p>Department: Planning</p>
<p>Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input checked="" type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> The Rides Reimagined community survey currently underway asks participants what would improve their SunLine experience, and answer options include amenities. SunLine has contracted with Transpo Group to review and strengthen SunLine’s Transit Asset Management Plan process to improve transparent decision-making, including setting criteria for siting, phasing, and funding key facilities (transit centers, shade structures, stops, roadway improvements, etc.). 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> The comprehensive operational analysis will assess the Agency’s bus stop infrastructure to determine if a fresh look will improve public perception and promote safety. Agency staff maintains ongoing collaboration with the local Sheriff’s Department and city policy departments to proactively address areas of concern across the service area. As part of these efforts, staff have renewed and submitted updated trespassing authorization forms to the valley’s law enforcement agencies. A comprehensive evaluation of system-wide bus stops is underway. This includes the inspection and replacement of No Trespassing signage to ensure visibility, compliance and effectiveness in deterring unauthorized activity. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> “No Trespassing” signs are being installed in SunLine shelters and facilities in collaboration with local municipalities that express interest. This initiative aims to enhance system safety/security, improve system appeal, and improve public perception of SunLine service as a safe mode of transportation. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- Staff is exploring new, more appealing street furniture options that could improve rider comfort and complement better the local, desert aesthetic.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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</p>	
<p>C Reevaluate SunLine’s brand strategies</p>	<p>ii. Freshen fleet appearance.</p>
<p>Priority Owner: Mark Perry/Edith Hernandez</p>	<p>Department: Maintenance</p>
<p>Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input checked="" type="checkbox"/> In place/monitoring; expected closure: June 30, 2026 _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Staff have advanced this project, and the new paint scheme is expected to be completed in the first quarter of 2026. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> A new paint scheme was selected, but the implementation has been delayed. The agency will be revisiting this project. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Staff is in the process of repainting buses. A process to detail bus interiors and exteriors is being established. A new paint scheme is being developed for future bus purchases. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.	
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	
D Strengthen SunLine’s community presence.	i. Complete website update.
Priority Owner: Edith Hernandez	Department: Legislative Affairs
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____	
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27	
Progress Update: January 2026	
<ul style="list-style-type: none"> Staff continue to update the website regularly to maintain visibility and ensure information remains current. This activity has been institutionalized and will be reflected in personal and/or departmental goals. 	
Progress Update: July 2025	
<ul style="list-style-type: none"> SunLine’s new website was launched on July 1, 2025, focusing on brand consistency, enhanced user-friendly design, and full legal compliance to better serve the community and stakeholders. 	
Progress Update: December 2024	
<ul style="list-style-type: none"> A new design is currently underway. The launch date for the new website is still to be determined. Established a new credit card processing system in September 2024 that is capable of working with the new website. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>			
<p>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</p>			
D	Strengthen SunLine’s community presence.		ii. Improve social media presence and response time to public feedback.
Priority Owner: Edith Hernandez		Department: Marketing/Legislative Affairs	
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>			
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>			
Progress Update: January 2026			
<ul style="list-style-type: none"> • Marketing staff continue to provide educational content across SunLine’s social media platforms and have collaborated with other agencies to promote initiatives. Staff have also begun providing quarterly marketing updates to the Board of Directors to highlight progress and engagement efforts. • This activity has been institutionalized and will be reflected in personal and/or departmental goals. 			
Progress Update: December 2024			
<ul style="list-style-type: none"> • Marketing staff has increased the frequency of educational posts across multiple social media platforms and are actively working to improve response times to public feedback to strengthen SunLine’s social media presence. Impressions have increased 38% between January and June 2025. 			

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>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</p>	
<p>D Strengthen SunLine’s community presence.</p>	<p>iii. Continue to build partnerships with local community and advocacy groups with shared interests and missions (e.g., American Heart Association/AHA).</p>
<p>Priority Owner: Edith Hernandez</p>	<p>Department: Legislative Affairs</p>
<p>Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input checked="" type="checkbox"/> In place/monitoring; expected closure: June 30, 2026</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> • SunLine has strengthened relationships with community leaders, including Lift to Rise, and will be hosting the 1st Annual Clothes Drive with Desert Best Friend’s Closet in January 2026. Staff also successfully participated in the annual Heart and Stroke Walk in December 2025, highlighting SunLine’s continued commitment to community health and engagement. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> • Released the EMPOWERED video segment, highlighting SunLine’s commitment to the community and partners through storytelling and awareness-building in the clean energy space. • Established partnership with Desert Best Friend’s Closet to host a clothing drive benefiting local residents, reinforcing SunLine’s support for community empowerment and self-sufficiency. • Successfully brought back the Pantry to the People food drive after a five-year hiatus, expanding SunLine’s role in addressing food insecurity across the Coachella Valley. • Collaborated with Desert Best Friend’s Closet to be a partner in their “Situational Assessment” program. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> • Established partnership with the AHA in July 2024 and chaired the 2024 Coachella Valley Heart and Stroke Walk. Joint marketing and public awareness campaigns and media events made possible through the partnership. • Established partnership with Ophelia Girls/JFK Foundation in September 2024 given mutual interest in equipping the Valley’s youth with life skills for future success. Partnership will allow for joint marketing and awareness campaigns/medial events. SunLine staff will actively work to inform youth of benefits of public transit and clean air technology through mentoring, training workshops, bus pass program, etc. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- Continue active participation in local organizations such as the Greater Coachella Valley Chamber of Commerce, Coachella Valley Economic Partnership, etc.
- Continue to participate in community events in member cities.
- Continue to host public awareness events and programs such as the Annual Student Art Contest.
- Actively work with marketing/outreach consultants to develop strategic communications plans, advertising campaigns, etc.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.	
GOAL 5: ENVIRONMENTAL STEWARDSHIP – Pursue and implement service and capital investments that lead to cleaner air, a healthier environment and improved quality of life for Coachella Valley residents and SunLine employees.	
STRATEGIC OBJECTIVES	PRIORITIES
A	Grow the alternative fuels program responsibly
	i. Complete a cost-benefit analysis of SunLine’s hydrogen fueling stations to inform staff on the operational efficiency, long-term sustainability/reliability, impacts on service expansion and reliability, etc., of each solution.
Priority Owner: Walter Watcher	Department: Capital Projects
Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____	
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input checked="" type="checkbox"/> In process/Continue to FY 27	
Progress Update: January 2026	
<ul style="list-style-type: none"> Nel/Cavendish provided draft service agreements for review. Integrated Cryogenics Solutions has completed its engineering review of the liquid station; identified where boil-off losses occur. Stantec will be completing their work on the cost/benefit and efficiency analysis. Monitoring and reporting shall continue. 	
Progress Update: July 2025	
<ul style="list-style-type: none"> Staff completed a financial and efficiency analysis of the new liquid hydrogen fueling station in June 2025. The data will be used to guide changes in fueling processes in an effort to improve efficiencies and reduce boil off losses. Stantec is conducting an analysis to increase efficiency of both the liquid and electrolyzer fueling stations. Efforts continue with the LH2 station contractor to increase station efficiency. Executive, SunFuels and Capital Projects staff continue working with Nel/Cavendish to improve station reliability, address long running reliability issues. Nel/Cavendish completed H2 Station Compressor modifications. This effort is expected to result in a service and maintenance agreement on the H2 Station modules and increased station uptime. 	
Progress Update: December 2024	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

- The Center for Transportation and the Environment (CTE) completed an initial cost assessment in September 2024 related to hydrogen production. Additional cost-benefit analyses being conducted by staff and Stantec consultants are underway to inform decisions on current and future hydrogen infrastructure and fuel investments.
- Work with Nel Hydrogen and Cavendish continue as it relates to the long-term viability, reliability, and ongoing operation/maintenance of the hydrogen electrolyzer fueling station. Further analyses on the costs and benefits of this station compared to the current liquid hydrogen and future fueling station(s) are being addressed by staff; the intent is to understand how to maximize cost and operational efficiencies as we continue to invest in hydrogen technology.

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.	
GOAL 5: ENVIRONMENTAL STEWARDSHIP – Pursue and implement service and capital investments that lead to cleaner air, a healthier environment and improved quality of life for Coachella Valley residents and SunLine employees.	
A Grow the alternative fuels program responsibly	ii. Update the Zero Emission Bus (ZEB) Transition Plan.
Priority Owner: Greg Wildman	Department: Planning
Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____	
Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27	
Progress Update: January 2026	
<ul style="list-style-type: none"> • The ICT Plan Update (ZEB Transition Plan) completed in April 2025. The goal will be closed. 	
Progress Update: July 2025	
<ul style="list-style-type: none"> • ZEB Transition Plan completed April 2025. 	
Progress Update: December 2024	
<ul style="list-style-type: none"> • Ongoing. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>					
<p>GOAL 5: ENVIRONMENTAL STEWARDSHIP – Pursue and implement service and capital investments that lead to cleaner air, a healthier environment and improved quality of life for Coachella Valley residents and SunLine employees.</p>					
A	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;">Grow the alternative fuels program responsibly</td> <td style="padding: 5px;">iii. Address spare ratio compliance with the Federal Transit Administration while expanding the hydrogen-powered bus fleet. The FTA mandated spare ratio is 20%, and SunLine has 2 years to comply.</td> </tr> <tr> <td style="padding: 5px;">Priority Owner: Mark Perry</td> <td style="padding: 5px;">Department: Maintenance</td> </tr> </table>	Grow the alternative fuels program responsibly	iii. Address spare ratio compliance with the Federal Transit Administration while expanding the hydrogen-powered bus fleet. The FTA mandated spare ratio is 20%, and SunLine has 2 years to comply.	Priority Owner: Mark Perry	Department: Maintenance
Grow the alternative fuels program responsibly	iii. Address spare ratio compliance with the Federal Transit Administration while expanding the hydrogen-powered bus fleet. The FTA mandated spare ratio is 20%, and SunLine has 2 years to comply.				
Priority Owner: Mark Perry	Department: Maintenance				
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>					
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>					
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Retired and disposed of buses that were noted to be beyond their useful life, which resulted in the Agency coming into compliance with the FTA requirements for spare ratio. Implemented the comprehensive Contingency Fleet Plan. Management of buses reaching the useful life benchmark is now fully internalized into the Maintenance Department practices and procedures. This priority is closed. 					
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> SunLine moved 39 vehicles to the contingency fleet. This realignment put our spare ratio at the FTA mandated 20%. Disposed of buses that reached their useful life. Eight leased buses were returned, which reduced the size of the fixed route fleet to a total of 88 buses. The Contingency Fleet Plan was updated in June 2024, and is now in effect. The contingency fleet is made up of 39 fixed route buses that have reached their useful life by mileage and/or age, but remain reliable. 8-10 contingency buses are in daily operation as the agency works to improve the reliability of the active zero-emission fleet. 					
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Ongoing: Work is underway to reprogram funding from BEB to FCEB this effort is anticipated to provide additional hydrogen fleet replacements. Work has been done to determine anticipated fleet size and vehicle identification. Vehicles that are not on the fleet list will be dismantled or auctioned to remove from fleet. Fleet should match the identified fixed route requirement in March of 2025. 					

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>GOAL 5: ENVIRONMENTAL STEWARDSHIP – Pursue and implement service and capital investments that lead to cleaner air, a healthier environment and improved quality of life for Coachella Valley residents and SunLine employees.</p>	
<p>B Implement service and capital improvements to minimize SunLine’s carbon footprint</p>	<p>i. Continue to explore capital improvements and programs to increase access to green hydrogen.</p>
<p>Priority Owner: Walter Watcher</p>	<p>Department: Capital Projects</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> The agency continues to resource sustainable and cost-effective hydrogen suppliers. This priority has been completed. Further reporting shall be as required. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Staff has engaged with multiple future producers of hydrogen. One potential project includes hydrogen production in conjunction with wind turbines. Staff is working with First Public Hydrogen for possible future green hydrogen supply agreements. Staff is working with IID and an engineering firm on the preliminary engineering for Indio D2 Utility Upgrade. The Thousand Palms Public Hydrogen Station has been registered with the state and will produce HRI credits for SunLine upon its opening to the public. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Awarded engineering services contract in October 2024 for Division II utility upgrade. Finance is collaborating with Capital Project team to establish LH2 station eligibility for Hydrogen Refueling Infrastructure (HRI) credits from the state. Staff will continue to look for ways to increase the renewable content of the power we use onsite to produce hydrogen. Work will be ongoing for this effort. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>GOAL 5: ENVIRONMENTAL STEWARDSHIP – Pursue and implement service and capital investments that lead to cleaner air, a healthier environment and improved quality of life for Coachella Valley residents and SunLine employees.</p>	
<p>B Implement service and capital improvements to minimize SunLine’s carbon footprint</p>	<p>ii. Consider pursuing a sustainability study of SunLine’s facilities and implementing a Sustainable Facilities Management Program, as resources allow.</p>
<p>Priority Owner: Walter Watcher</p>	<p>Department: Capital Projects</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> The grants required to pursue this priority were not awarded to the agency. The agency continues to pursue additional and alternative grant opportunities. This item is closed. Draft master plan will be reported at a future date by Capital Projects. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Application for the CMAQ grant to install additional solar covered parking and EV charging at the Thousand Palms facility has been submitted. A draft Facility master plan completed as of April 2025 for the Thousand Palms campus. Staff plans to have an engineering firm review and comment on the Plan to ensure thoroughness and appropriateness. SunLine was not awarded the RAISE grant. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> SunLine’s FY 2024 federal RAISE grant application was automatically resubmitted by Federal DOT staff to complete a sustainability study/facilities management plan, given its high rating in the last evaluation process. A final decision is expected by summer 2025. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>GOAL 5: ENVIRONMENTAL STEWARDSHIP – Pursue and implement service and capital investments that lead to cleaner air, a healthier environment and improved quality of life for Coachella Valley residents and SunLine employees.</p>	
<p>C Obtain staff buy-in and understanding of SunLine’s commitment to sustainability</p>	<p>i. Increase internal communication on SunLine’s commitment to shaping healthy communities, improving air quality in the Coachella Valley and regionally, as well as helping the transportation industry transition to zero emission through our leadership in clean air technology and alternative fuels.</p>
<p>Priority Owner: Edith Hernandez</p>	<p>Department: Legislative Affairs</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> SunLine continues to provide agency updates through Transit Talk, the bi-monthly newsletter, as well as regular all-staff communications and meetings highlighting ongoing initiatives, such as free fare days. These efforts support internal understanding and engagement with SunLine’s programs and priorities across the organization. This activity has been institutionalized and will be reflected in personal and/or departmental goals. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Released <i>Transit Talk in March 2025</i>, an agency-wide newsletter sent out bi-monthly designed to improve internal communication and keep staff informed on agency updates. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Ongoing: Insight Strategies’ support in reframing SunLine’s mission and vision statements, in collaboration with staff throughout the organization, is helping with internal understanding and buy-in of our commitment to sustainability and investments in clean air technology. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>GOAL 5: ENVIRONMENTAL STEWARDSHIP – Pursue and implement service and capital investments that lead to cleaner air, a healthier environment and improved quality of life for Coachella Valley residents and SunLine employees.</p>	
<p>C Obtain staff buy-in and understanding of SunLine’s commitment to sustainability</p>	<p>ii. Increase internal communication on staff efforts to balance investments in leading edge technology with efforts to ensure service reliability.</p>
<p>Priority Owner: Edith Hernandez</p>	<p>Department: Legislative Affairs</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> Townhall meetings were held in December 2025, where the Executive Team provided agency updates, shared ongoing initiatives, and reinforced the FY26 Strategic Priorities. These sessions complement previous presentations of the Mission and Vision Statements and continue efforts to ensure all employees are kept informed across all shifts. This activity has been institutionalized and will be reflected in personal and/or departmental goals. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> Townhalls occurred July 8-10, 2025, where the Executive Team presented the new Mission and Vision Statements, along with the FY26 Strategic Priorities, among other topics. A presentation was also made to the graveyard shift in Maintenance, and efforts will continue to ensure that all employees are kept informed as well as possible. Townhall meetings also occurred in December 2024. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Ongoing: Town halls/“roadshows” are being planned in December and future months, related to the strategic planning work being done with Insight Strategies, for the CEO/GM and Chiefs to share information on SunLine priorities and efforts to strengthen service reliability and safety. 	

Attachment 1: Continuation FY 2025 SunLine Goals, Strategic Objectives & Priorities

<p>This FY 2025 Goal supports the following from the FY '26 Strategic Plan: Strategic Priority 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.</p>	
<p>GOAL 5: ENVIRONMENTAL STEWARDSHIP – Pursue and implement service and capital investments that lead to cleaner air, a healthier environment and improved quality of life for Coachella Valley residents and SunLine employees.</p>	
<p>C Obtain staff buy-in and understanding of SunLine’s commitment to sustainability</p>	<p>iii. Leverage the Wellness Committee to promote a healthy workforce and efforts to reduce our carbon footprint.</p>
<p>Priority Owner: Edith Hernandez</p>	<p>Department: Legislative Affairs</p>
<p>Goal status as of 12/30/25 <input checked="" type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____</p>	
<p>Goal status as of 6/30/26 <input type="checkbox"/> Completed and closed <input type="checkbox"/> In place/monitoring; expected closure: _____ <input type="checkbox"/> In process/Continue to FY 27</p>	
<p>Progress Update: January 2026</p> <ul style="list-style-type: none"> The Wellness Committee continued promoting staff health and engagement through a series of initiatives in 2025. In October, staff participated in a Pumpkin Carving Contest. In December, the Committee hosted a Festive Week for the holidays. Wellness Monday emails are distributed monthly to all staff, providing ongoing tips and resources to support well-being. In August, Marketing held the first Snow Cone Social to give staff an opportunity to connect and assisted with the return of the Around the World Potluck in November. This activity has been institutionalized and will be reflected in personal and/or departmental goals. 	
<p>Progress Update: July 2025</p> <ul style="list-style-type: none"> The Wellness Committee organized a 12-week weight loss challenge with 35 participants, who personally decided to participate. They experienced health improvements following the initiative, and four winners were announced from the challenge. A staff step challenge was also done in conjunction with the 2024 American Heart Association (AHA) Heart and Stroke Walk event, which SunLine chaired. An event was held earlier this year to celebrate participants in the challenge and the Heart and Stroke Walk. 	
<p>Progress Update: December 2024</p> <ul style="list-style-type: none"> Ongoing 	



SunLine Services Group

Item 13

Board Report

February 25, 2026

AGENDA ITEM: ACTION

TO: Taxi Committee/Committee of the Whole
Board of Directors

FROM: Jill Plaza, Taxi/Contracted Transportation Services Administrator

SUBJECT: Resolution No. 0100 Adopting Permitting Fees for Taxicab Services
Within the Coachella Valley for Fiscal Year 2027

Recommendation:

Recommend that the Board of Directors (Board) approve the attached Resolution No. 0100 adopting taxicab permitting fees and authorizing 12-month installment payment plans effective July 1, 2026 through June 30, 2027.

Background:

California Government Code 53075.5 authorizes SunLine Services Group (SSG) to levy fees in an amount sufficient to cover the costs of regulating taxicab transportation services within its jurisdiction. Fiscal Year (FY) 2027 regulatory permitting fees are to be approved by the Board prior to staff bringing forward the FY27 SSG budget for approval.

Neither SSG capital funds nor SunLine Transit Agency (STA) can subsidize SunLine Regulatory Administration (SRA) operations. Taxi regulatory fees are the sole source of revenue to support SRA operations.

SRA has continued to support the taxi industry by holding firm or reducing fees, as well as working to keep expenses as low as possible in order to maintain a balanced budget. SRA was efficient in its budget management in FY25, resulting in a savings of \$57,689.00.

In an effort to continue supporting the taxi industry, and as a result of conservative financial management of expenses during FY25, SRA's proposed FY27 Fee Schedule will have no fee increases. SRA will monitor permitting fee revenue over the next year to determine adjustments to the fee schedule for the FY28 budget. Installment plans for the annual business permit and vehicle permits are recommended to remain in place.

Financial Impact:

Staff is expected to meet all FY27 expenses through the proposed fee schedule and the savings from FY25.

Strategic Priority:

Resource Acquisition, Allocation, and Management: Prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability.

In Collaboration with:

Luis Garcia, Chief Financial Officer

Approved/Reviewed by:

Mona Babauta, CEO/General Manager

Catherine J. Groves, General Counsel

Greg Wildman, Chief of Strategic Alignment

Attachments:

- [Item 13a](#) – SRA FY27 Fee Schedule
- [Item 13b](#) – Resolution No. 0100

FY27 SSG FEE SCHEDULE

Fee Description	FY25 Fee Amount	FY26 Fee Amount	Proposed FY27 Fee Amount	Variance
New Taxicab Business Permit Application Fee	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ -
Taxicab Business Permit Renewal Application Fee	\$ 500.00	\$ 500.00	\$ 500.00	\$ -
Annual Business Permit	\$ 32,000.00	\$ 28,800.00	\$ 28,800.00	\$ -
Business Permit Reinstatement	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ -
Annual Vehicle Permit (Gasoline/Diesel)	\$ 1,650.00	\$ 1,485.00	\$ 1,485.00	\$ -
Annual Vehicle Permit (Hybrid¹ /Alt Fuel²)	\$ 850.00	\$ 765.00	\$ 765.00	\$ -
Annual Vehicle Permit (WAV³ /Zero Emission⁴)	\$ 200.00	\$ 180.00	\$ 180.00	\$ -
Vehicle Permit Reinstatement	\$ 65.00	\$ 65.00	\$ 65.00	\$ -
New Driver Permit	\$ 75.00	\$ 75.00	\$ 75.00	\$ -
Driver Permit Renewal	\$ 25.00	\$ 25.00	\$ 25.00	\$ -
Driver Permit Transfer	\$ 25.00	\$ 25.00	\$ 25.00	\$ -
Driver Permit Reinstatement	\$ 25.00	\$ 25.00	\$ 25.00	\$ -
Driver Permit Replacement	\$ 10.00	\$ 10.00	\$ 10.00	\$ -
Appeal Fee	\$ 100.00	\$ 100.00	\$ 100.00	\$ -
Taxicab Distinct Appearance Determination Appeal Fee	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00	\$ -
Late Fee ⁵ (for late payment of invoices)	\$ 25.00	\$ 25.00	\$ 25.00	\$ -

^[1] "Hybrid" means Hybrid Electric/Gas Vehicle (HEV) and Plug-in Electric/Gas Hybrid Vehicle (PHEV)

^[2] "Alt Fuel" means alternative fuel vehicles that use Compressed Natural Gas (CNG), Biodiesel, or Ethanol (E85) fuel blends to operate

^[3] "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.

^[4] "Zero Emission" means Electric Vehicles (EV) and Hydrogen-Powered Fuel-Cell Vehicles (FCEV)

^[5] Late fees shall be assessed at \$25.00 per day, not to exceed \$1,000.00 per occurrence

SUNLINE SERVICES GROUP

RESOLUTION NO. 0100

A RESOLUTION OF THE BOARD OF DIRECTORS OF THE SUNLINE SERVICES GROUP ADOPTING FEES FOR TAXICAB SERVICES WITHIN THE COACHELLA VALLEY FOR FISCAL YEAR 2027

WHEREAS, the County of Riverside and the Coachella Valley cities comprising the joint powers agency known as SunLine Services Group (SSG) desire to provide for the orderly, efficient, and safe operation of taxicab services within the Coachella Valley;

WHEREAS, SSG and its Board of Directors is authorized pursuant to Government Code Section 53075.5 to levy by resolution, fees in an amount sufficient to pay for the costs of carrying out Ordinance No. 2025-02 regulating taxicab services within the Coachella Valley; and

WHEREAS, the Board of Directors hereby finds that the fees established herein are imposed solely to recover the actual and reasonable costs of regulating taxicabs within the Coachella Valley, and therefore is not a tax under California Constitution Article XIII C.

NOW THEREFORE, BE IT RESOLVED by the Board of Directors of SunLine Services Group that:

1. Definitions. The following terms shall have the meanings ascribed to them below. Terms that are not specifically defined below shall have the meaning provided for in Ordinance No. 2025-02:

- 1.1 ALT FUEL means alternative fuel vehicles that use Compressed Natural Gas (CNG), Biodiesel or Ethanol (E-85) fuel bonds to operate.
- 1.2 BUSINESS PERMIT means the permit issued by SSG to a business authorizing the business to operate taxicab services in the jurisdictional boundaries of SSG as provided for in Ordinance No. 2025-02.
- 1.3 DRIVER PERMIT means the permit issued by SSG to an individual person authorizing the individual to control and manage a taxicab as provided for in Ordinance No. 2025-01.
- 1.4 HYBRID means Hybrid Electric/Gas Vehicle (HEV) and Plug-in Electric Gas Hybrid Vehicle (PHEV).
- 1.5 VEHICLE PERMIT FEE means a non-transferrable authorization to drive or operate a vehicle in an authorized taxicab transportation

service within the jurisdictional boundaries of SSG, whether as owner, lesser, lessee or otherwise.

- 1.6 WAV means the wheelchair accessible vehicle that has the ability to load wheelchair users safely and without the need for the wheelchair user to leave their wheelchair.
- 1.7 ZERO EMISSION means Electric Vehicles (EV) and Hydrogen-Powered Fuel-Cell Vehicles (FCEV).

2. As a condition precedent to issuance of a permit as authorized by SSG Ordinance 2025-02, all applicable fees shall be paid in full at the time an application has been approved, unless otherwise provided for in Section 3 of this Resolution. The following fees shall be charged for the administration and regulation of taxicab services within the Coachella Valley:

New Taxicab Business Application Fee	\$ 1,000.00
Annual Taxicab Business Permit Renewal Application Fee	\$ 500.00
Annual Taxicab Business Permit	\$ 28,800.00
Business Permit Reinstatement Fee	\$ 10,000.00
Annual Vehicle Permit Fee (Gasoline/Diesel)	\$ 1,485.00
Annual Vehicle Permit Fee (Hybrid/Alt Fuel)	\$ 765.00
Annual Vehicle Permit Fee (WAV/Zero Emission)	\$ 180.00
Vehicle Permit Fee, Reinstatement	\$ 65.00
New Driver Permit	\$ 75.00
Driver Permit Renewal	\$ 25.00
Driver Permit Transfer Fee	\$ 25.00
Driver Permit Reinstatement Fee	\$ 25.00
Driver Permit Replacement	\$ 10.00
Appeal Fee	\$ 100.00
Taxicab Distinct Appearance Determination Appeal Fee	\$ 1,200.00

3. Installment Payments.

- 3.1 The Board of SSG hereby authorizes the Taxi Administrator to accept payments of the "Annual Taxicab Business Permit" fee in 12 monthly installments, beginning July 1, 2026 through June 1, 2027, for a total of \$28,800.00, with the initial installment payment being due as a condition precedent to issuance of such permit.
- 3.2 The Board of SSG hereby authorizes the Taxi Administrator to accept payments of "Annual Vehicle Permit" fees in 12 monthly installments, beginning July 1, 2026 through June 1, 2027. Installment payments for "Annual Vehicle Permit" fees must meet the following requirements:
 - (a) Each permitted taxi business must provide a list of taxicabs to be included in the installment plan no later than June 13, 2026.

- (b) Taxicabs permitted after June 12, 2025 will be due in full; prorated for the remainder of the fiscal year.
- (c) If a vehicle is permanently taken out of service with a balance due to SSG of the Vehicle Permit Fee for the year, such fee shall become immediately due and payable.

3.3 Installment payments shall be due on the first day of the month.

4. Late Payments.

4.1 A payment is late if not paid on or before the first day of each month. Late payments impose a late payment fee of \$25.00 per day that the payment is delinquent, not to exceed \$1,000.00.

5. This Resolution shall take effect July 1, 2026.

ADOPTED this 25th day of February, 2026.

AYES:

NOES:

ABSENT:

ABSTAIN:

ATTEST:

Vanessa Ordorica
Clerk of the Board
SunLine Services Group

Lynn Mallotto
Chairperson of the Board
SunLine Services Group

APPROVED AS TO FORM:

Catherine J. Groves
General Counsel



SunLine Transit Agency

Item 14

February 25, 2026

Board Report

AGENDA ITEM: INFORMATION

TO: Board of Directors

FROM: Mona Babauta, CEO/General Manager

SUBJECT: General Manager's Report for February 2026

Recommendation:

Recommend that the Board of Directors (Board) receive the General Manager's Report for February 2026 and provide feedback as appropriate.

Background:

Each month, the CEO/General Manager provides the Board with a summary of key agency activities, events, initiatives, and operational updates. This report is intended to keep the Board informed of notable developments across departments and provide transparency regarding ongoing and upcoming efforts supporting SunLine Transit Agency's mission and strategic goals.

Financial Impact:

There is no financial impact associated with this item.

Strategic Priority:

People & Workforce: Our commitment 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/customers.

In Collaboration with:

Executive Team Members

Approved/Reviewed by:

Mona Babauta, CEO/General Manager

Catherine J. Groves, General Counsel

Attachments:

- General Manager's Report for February 2026

Human Resources Update

Retirees

I extend my deepest appreciation to our employee for her many years of dedicated service to SunLine. I wish her the best in her well-earned retirement and thank her for their valued contributions.

- Guadalupe Murillo – 13 years of service

New Hires

During the month of January, SunLine welcomed several new employees across multiple departments. These staff members will support the Agency's ongoing operational needs and help strengthen our ability to provide safe, efficient, and reliable transit services. We look forward to their contributions as they join the SunLine team!

- Lance Brenner – Deputy Chief Financial Officer
- Julio Gonzalez – Field Supervisor
- David Ramirez – Transit Trainer
- Manuel Rios – Grants Analyst

Promotions

I am pleased to recognize the following employee on their recent promotion. These advancements reflect their hard work, performance, and commitment to professional growth within the Agency. Congratulations to our staff member, and I look forward to their continued success in their new roles.

- Josue Torres – Field Supervisor

Transportation Update

ATLAS Update – Thousand Palms, CA

We are excited to share that a total of **21 mentees** have now been successfully paired with mentors through the ATLAS program. This includes ten (10) Fixed Route Operators, six (6) Paratransit Operators and five (5) Maintenance employees. These mentor-mentee matches represent an important step in supporting professional development and creating meaningful connections across the organization. We look forward to seeing these partnerships continue to build engagement, provide guidance, and help participants reach their personal and career goals. In addition, we continue to actively work with California

Transit Works (CTW), union leadership, and local community college institutions, including the College of the Desert (COD) and others with prior experience, on establishing apprenticeship programs for both mechanic and bus operator positions; the ATLAS program will serve as a foundation for ensuring their ultimate success by providing supportive, mentorship scaffolding and a pathway to higher education for everyone involved.

Regional Customer Experience Collaboration Team – (January 28, 2026)

Customer Care Coordinator, Tammy Edwards, and Customer Service Manager, Tiffany Moore, joined the Regional Customer Experience Collaboration monthly call with the following transit agencies: Mountain Transit, Riverside Transit Agency, Omni Transit, and Victor Valley Transit Authority. The purpose of this meeting is to collaborate and discuss key customer experience topics each month, including:

- Key Performance Indicator (KPI) overviews for customer experience and customer service goals
- Best practices across agencies
- Customer service training initiatives
- “What’s New” updates and opportunities for improvement

This collaborative group will continue meeting monthly as an open forum to exchange ideas, share experiences, and support ongoing customer service growth across multiple agencies.

Community/Industry Engagement Events

SunLine: Rides Reimagined Outreach Events – Various Locations (January 2026)

Staff from Planning/Strategic Alignment, Marketing/Outreach, Operations, the Clerk’s office, Finance, as well as other departments have been providing presentations at locations throughout the Valley, while also assisting community members with questions about the survey being conducted during the first phase of [SunLine: Rides Reimagined](#).

The team has presented at the following events:

- City and Unincorporated County Council Meetings: All cities and county councils have received presentations at this point, except the City of Desert Hot Springs scheduled for March 3rd
- Mecca Family & Farmworker’s Service Center – Mecca, CA (January 13, 2026)
- Desert Recreation Resource Fair – Indio, CA (January 17, 2026)
- Coachella Senior Center – Coachella, CA (January 20, 2026)

- Cathedral City Senior Center – Cathedral City, CA (January 26, 2026)
- Indio Senior Center – Indio, CA (January 29, 2026)
- CVUSD & St. John's Healthy Heart Awareness Resource Fair – Thermal, CA (January 31, 2026)
- CVAG Transportation Committee – February 2, 2026
- Coachella Valley Equity Collaborative – February 4, 2026

Also, a presentation to the Desert Healthcare District and Foundation Board of Directors on February 24, 2026.

I want to highlight the incredible teamwork amongst the SunLine staff, the Jarrett Walker and Associates (JWA) team, and Andrea Carter (SunLine Marketing Contractor/Advertising consultant) in thoughtfully designing an inclusive outreach process. I also want to sincerely thank our community partners, stakeholders, including all the cities, county, and regional planning staffs, who have welcomed SunLine into their spaces to share the work we are doing on the [“SunLine: Rides Reimagined” process](#) and who participated in our outreach events to date. Again, this system reimagining process will continue throughout this calendar year, and I welcome any comments from the Board, the community and our valued partners on the effectiveness of or necessary improvements to the process we’ve designed.

Travel Training at Park David Senior Apartments – Cathedral City, CA (January 15, 2026)

The Marketing Team conducted a travel training session at Park David Senior Apartments in Cathedral City, which was designed to support seniors by providing them with the tools and knowledge needed to confidently navigate our 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. During this event, the team also asked the attendees to provide their feedback by taking the SunLine: Rides Reimagined survey.

This event highlighted our ongoing commitment to accessibility, inclusivity, and enhancing customer experience through community-focused outreach and education.

SunLine’s 1st Clothing Drive to Benefit Desert Best Friend’s Closet – Thousand Palms, CA (January 22, 2026)

For the first time, SunLine hosted a clothing drive to support Desert Best Friend’s Closet. A Paratransit vehicle was staged outside the Administration building at SunLine Transit Agency on Thursday, January 22, 2026, between 9:00 a.m. and 4:00 p.m., SunLine staff and

the community demonstrated remarkable generosity, nearly filling the vehicle with donations.

WTS-IE: 21st Annual Scholarship & Awards Benefit Dinner – Riverside, CA (January 22, 2026)

I had the honor of serving as the keynote speaker at this year's Scholarship & Awards Benefit Dinner for the [Inland Empire Chapter](#) at the Riverside Convention Center. It was a privilege to help open such a meaningful event that supports both aspiring students and those pursuing their education in transportation and public service. I want to thank the WTS Inland Empire Chapter for the opportunity to participate in this impactful, sold-out event that was attended by transportation partners throughout Riverside, San Bernardino, Imperial and neighboring counties.

Travel Training to Youth at James O. Jessie Highland Unity Center – Palm Springs, CA (January 26, 2026)

The Marketing Team delivered a travel training workshop at James O. Jessie Highland Unity Center in Palm Springs, tailored to support middle and high-school-aged youth. The session focused on building the skills and confidence needed to independently navigate the transit system.

The workshop provided an overview of SunLine services and included a hands-on demonstration of how to download and use SunLine's mobile applications, with staff available to offer individualized assistance. Participants were also invited to share feedback by completing the SunLine: Rides Reimagined survey. Following the session, the youth leader expressed interest in coordinating a future in-person bus ride-along travel training for select participants.

Via Transit Summit – Los Angeles, CA (January 29, 2026)

Jill Plaza, Taxi/Contracted Transportation Services Administrator, attended Via's Transit Summit in Los Angeles. Via is the turn-key service provider for SunLine's microtransit program, SunRide. The conference was a combination of presentations and roundtable discussions, and offered opportunities to network and learn what best practices other agencies are using to grow microtransit programs. Multiple agencies from around Southern California were in attendance and discussed innovations to use microtransit to bridge transit gaps, such as multi-modal trip planning. Several presenters shared alternative methods to supplement regional transit funding, such as creating a 501c3 to fund program services, and partnering with non-traditional sources, such as AARP, to secure funding to supplement seniors transit needs.

Riverside County Planning Commission Meeting Update – Riverside, CA (February 18, 2026)

On February 18, staff attended the Planning Commission meeting at the County Administrative Center, where the Haskell Road vacation request was presented as a consent calendar item. The report, presented by County staff, outlined the project's importance and confirmed that no opposition had been received from surrounding property owners.

The Commission approved the item by a vote of **4-0**, authorizing the Transportation Department to continue processing the street vacation request.

Next steps include scheduling a **Notice of Intent** with the Board on or about **March 10**, followed by a **public hearing** anticipated on or about **April 14**.