



SunLine Transit Agency
January 28, 2026
11:30 a.m. – 11:55 a.m.

AGENDA

STRATEGIC PLANNING & OPERATIONAL COMMITTEE/ COMMITTEE OF THE WHOLE

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

NOTICE TO THE PUBLIC

In compliance with the Brown Act, agenda materials distributed 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.

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Meeting Note: This Committee meeting may be attended by Members of the Board of Directors who do not serve on this Committee. In the event that a quorum of the entire Board is present, this Committee shall act as a Committee of the Whole. A vote of the Committee of the Whole does not constitute final Board action. All Committee actions must be ratified by the full Board of Directors. All items appearing on the agenda are subject to action by the Committee.

ITEM

RECOMMENDATION

- 1. CALL TO ORDER**
- 2. FLAG SALUTE**
- 3. ROLL CALL**

<u>ITEM</u>	<u>RECOMMENDATION</u>
4. FINALIZATION OF AGENDA	
5. PUBLIC COMMENTS	RECEIVE COMMENTS
NON AGENDA ITEMS	
Members of the public may address the Committee regarding any item within the subject matter jurisdiction of the Committee; 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. Comments may be limited to 3 minutes in length.	
6. PRESENTATIONS	
7. COMMITTEE MEMBER COMMENTS	RECEIVE COMMENTS
8. BOARD OF DIRECTORS UPDATE: FISCAL YEAR 2026 SUNLINE STRATEGIC PRIORITIES AND GOALS (Staff: Greg Wildman, Chief of Strategic Alignment)	DISCUSSION (PAGE 3-39)
9. ADJOURN	



SunLine Transit Agency
Board Report

Item 8

January 28, 2026

AGENDA ITEM: DISCUSSION

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

FROM: Greg Wildman, Chief of Strategic Alignment

SUBJECT: Board of Directors Update: Fiscal Year 2026 SunLine Strategic Priorities and Goals

Recommendation:

Recommend that the Board of Directors (Board) receive the mid-year update on SunLine Transit Agency's (SunLine) Fiscal Year (FY) 2026 Strategic Priorities and Goals and provide feedback as appropriate.

Background:

Through the guidance and direction provided by Teri Fisher at Insight Strategies, Inc., CEO, and staff collaborated to develop the FY 2026 Strategic Plan, inclusive of the following six (6) Strategic Priorities:

- Strategic Priority 1: Service Reliability
- Strategic Priority 2: Customer Experience
- Strategic Priority 3: Environmental Impact
- Strategic Priority 4: Safety and Security
- Strategic Priority 5: People/Workforce
- Strategic Priority 6: Resource Acquisition, Allocation, & Management

The Executive Team and staff developed associated strategic goals for each of the priorities which are detailed in Attachment 1.

In June 2025, the Board adopted SunLine FY 2026 Strategic Plan.

This mid-year update details the established goals and the progress made toward achieving the FY 26 Strategic Plan. For this report, progress is noted as bulleted items in the section, **Progress Update: January 2026**, in Attachment 1 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

Approved/Reviewed by:

Mona Babauta, CEO/General Manager

Catherine J. Groves, General Counsel

Attachments:

- [Item 8a](#) - Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP1 – Strategic Agency Goal 1: Increase and sustain fleet availability for Fixed Route to 20% above scheduled peak requirement by May 3, 2025.

Goal Owner: Mark Perry | **Department:** Maintenance

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: June 30, 2026

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

- Retired and disposed of 24 fixed-route buses that were 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.
- Realignment of operational, process, staffing and management, in addition to staff training, have had significant influence on increasing fleet availability.
- Maintenance has established June 30, 2026 as the deadline for achieving and sustaining this goal.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP1 – Strategic Agency Goal 2: Increase and sustain fleet availability from less than 80% for paratransit to 90% of fleet to be completed by May 1, 2025.

Goal Owner: Mark Perry	Department: Maintenance
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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

- Retired and disposed of 24 fixed-route buses that had reached their useful life.
- Acquired 23 new buses and 10 paratransit vehicles to replace retired fleet with new buses.
- Effectuated repairs on 12 of the 14 buses on the Long Term Down list and put buses back into service.
- Achieved full staffing of non-revenue maintenance mechanics.
- Goal is achieved. Continued efforts to achieve the established service reliability standards have been incorporated into the Maintenance Department's processes and future progress toward sustaining fleet availability is a departmental goal.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP1 – Strategic Agency Goal 3a: Establish agency operational standards for fleet and facilities maintenance and replacement by June 30, 2025

Goal Owner: Mark Perry | **Department:** Maintenance

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: June 30, 2026

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

- Realignment and restructuring of content in Hexagon to meet Maintenance and Fleet management needs for data collection and analysis.
- Staff continues the realignment process and expand the restructuring process to other modules within Hexagon.
- Hired maintenance department Performance Analyst to track trends and develop a pro-active action plan to manage fleet.
- Work continues to refine and internalize the standards into departmental practice. Expected achievement of this goal is June 30, 2026.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP1 – Strategic Agency Goal 3b: Achieve 100% adherence to agency operational standards by SunLine Staff by December 31, 2025

Goal Owner: Mark Perry	Department: Maintenance
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Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: June 30, 2026

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

- Refocused Maintenance Department efforts toward achieving and sustaining completion of preventative maintenance CHP guidelines and practices.
- Corrected data transfer from Broadlux to Hexagon to improve data and information was correct to enable identification of vehicles requiring preventative maintenance.
- As of 12/31/25, Maintenance Department achieved 100% compliance with CHP guidelines for preventative maintenance and practices during

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP1 – Strategic Agency Goal 4: Establish a contingency plan to achieve 100% fueling availability at all times by June 30, 2025.

Goal Owner: Mark Perry | **Department:** Maintenance

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

- 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.
- Restructured Utilities/Maintenance to ensure coverage for mid-day fueling.
- Goal achieved by established deadline.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP1 – Strategic Agency Goal 5: (Updated 2/24/25): Implement strategies towards achieving fixed route missed trips to zero by June 30, 2025.

Goal Owner: Isabel Vizcarra | **Department:** Operations

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: June 30, 2026 _____

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

- Data analysis and root cause evaluation have been completed. Performance improvement measures were formulated and implementation has been completed. Monthly KPI reports have been established and are continuously utilized to track service reliability, identify missed-trip trends, and pinpoint route and time specific operational hotspots. Dispatcher training sessions focused on service recovery strategies have been implemented and are maintained as an ongoing operational practice.
- For the months of October – December 2025, the agency was scheduled to provide 50,300 trips. Sixty-six (66) trips were missed, or .13% of service.
- The Operations department continues to perform its root cause analysis to determine the causes of missed trips and develop corresponding mitigation.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.		
SP1 – Strategic Agency Goal 6a: Establish a comprehensive plan/training program for maintenance staff to develop skillsets needed to maintain 100% of the fleet.		
Goal Owner: Mark Perry	Department: Maintenance	
Goal status as of 12/30/25	<input type="checkbox"/> Completed and closed	<input checked="" type="checkbox"/> In place/monitoring; expected closure: December 31, 2027
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">• Select Maintenance Mechanics received training from Ballard for fuel cell repair. The agency is now the only transit agency in the country allowed to perform maintenance and repairs on the Ballard Fuel cell. Because of this, downtime for ZEB has reduced 72% in the last quarter of 2025.• Maintenance Department orientation program and C-level Mechanic Competency Assessment program completed in December 2025.• Superintendent of Zero Emissions is developing a 4-part training program for zero-emissions buses. Expected completion is December 31, 2027.		

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP1 – Strategic Agency Goal 6b: Establish a basic universal level of skills competency across 100% of the fleet maintenance staff by January 30, 2027.

Goal Owner: Mark Perry | **Department:** Maintenance

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: January 2027

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

- Maintenance Department orientation program and C-level Mechanic Competency Assessment program completed December 2025. The model developed for this assessment process shall be applied to general maintenance mechanics.
- ZEB training consultant is assisting with the development of the comprehensive zero-emission training program. Superintendent of Zero Emission has been assigned the development of training and comprehensive skills assessments for mechanical and electronic systems other than zero-emissions.
- Expected January 2027.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP1 – Strategic Agency Goal 7: Decrease voluntary turnover of coach operators from 13.5% (CY'24) to less than 5% for the next 3 years (June 30, 2026). (Added 3/4/25). (exclude retirements & promotions)

Goal Owner: Isabel Vizcarra/Tamara Miles | **Department:** Operations/Human Resources

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: June 30, 2027

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

- That ATLAS Mentorship Program went live in December 2025. See FY 25 report for detailed status update. Future updates on this mentor/apprenticeship program to be incorporated into this Strategic Agency Goal.
- HR has begun working on a revised onboarding program with periodic new driver surveys and assessments to gauge satisfaction with the role. Actions and initiatives will be developed based on the feedback received from that program.
- Continue to track and monitor key performance indicators pertaining to operator turnover.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP1 – Strategic Agency Goal 8: Expand service to meet growing community needs within 1-5 years of resources becoming available.

Goal Owner: Greg Wildman | **Department:** Planning/Strategic Alignment

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: December 30, 2027

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

- SunLine engaged the services of Jarret Walker and Associates to perform a comprehensive operational analysis, as part of its SunLine: Rides Reimagined initiative, to solicit feedback and input from community stakeholders and the public regarding the current and desired transit services.
- The results of this 18-month initiative will be incorporated into the agency's campaign promoting ballot initiatives and engagement of politicians at both the state and federal levels to support of needed funding to provide expanded and more robust public transit services.
- Expanded services is predicated on receiving sufficient funding.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP2 – Strategic Agency Goal 1a: Establish a measurable baseline of brand and service awareness by conducting a community outreach survey by June 30, 2026.

Goal Owner: Edith Hernandez | **Department:** Marketing

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: June 30, 2026

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

- Marketing has engaged Andrea Carter & Associates to develop a community outreach program to promote environmental awareness.
- Questions or survey items regarding brand awareness are currently in development to be included in that campaign.
- Staff initiated efforts to establish a measurable baseline of community awareness of SunLine's brand and services by leveraging existing data sources, including Transit app surveys, onboard surveys, and ongoing community outreach and awareness (COA) efforts. Early work is focused on identifying key awareness indicators and aligning current survey tools to support baseline measurement.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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 Agency Goal 1b: Improve positive perception of brand and service awareness from baseline to TBD over the next (3) years, by December 31, 2029.

Goal Owner: Edith Hernandez | **Department:** Marketing

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: December 31, 2029

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

- Baseline brand awareness predicated on the outcome of the outreach efforts described in Strategic Priority 2, Strategic Goal 1a.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP2 – Strategic Agency Goal 2: Enhance customer experience and service accessibility by implementing a new app/technology with accurate real-time bus tracking and service alerts with fare payment options by December 31, 2026.

Goal Owner: Edith Hernandez

Department: Marketing

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: June 30, 2027 (GMV & Fare Payment Systems)

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

- 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.
- Staff are in the process of advancing the open-loop, contactless payment system through Cal-ITP. Pre-qualified partner teams have been identified. Staff will be evaluating the available options within the Cal-ITP framework and reviewing system demonstrations to determine the solution that best meets SunLine's needs.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP2 – Strategic Agency Goal 3: Establish a measurable baseline of current service and operations by conducting a comprehensive operational analysis (COA) to be completed by December 31, 2027.

Goal Owner: Edith Hernandez

Department: Marketing

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: December 31, 2027

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

- SunLine engaged the services of Jarret Walker and Associates to perform a system redesign process, branded as “SunLine: Rides Reimagined”, to solicit feedback and input from community stakeholders and the public regarding the current and desired transit services.
- Changes in service levels and areas, as influenced by the system redesign process, would be predicated on the availability of resources and system performance goals or objectives, such as ridership growth.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP2 – Strategic Agency Goal 4a: Understand customers, potential customers, and community values and needs from the time a person thinks about transit to their final destination by embarking on a journey mapping strategy to be completed by June 30, 2026.

Goal Owner: Edith Hernandez | **Department:** Marketing

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: June 30, 2026.

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

- Staff initiated early planning for a journey mapping strategy to better understand customer and community needs across the full transit experience. Initial efforts are focused on defining scope, identifying key customer touchpoints, and coordinating internally, with a phased work plan to be developed in the coming months toward the June 30, 2026 completion.
- Partnering with Transit App to ensure riders and potential riders can successfully plan efficient route from origin to destination.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP2 – Strategic Agency Goal 4b: Improve customer experience (CX) by closing 100% of the gaps uncovered in the journey mapping plan by June 30, 2027.

Goal Owner: Edith Hernandez | **Department:** Marketing

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

- TBD; predicated on accomplishing Strategic Priority 2, Strategic Goal 4a.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP3 – Strategic Agency Goal 1a: Establish a baseline of public awareness to the benefit of zero emission transportation (ZET) by December 30, 2025.

Goal Owner: Ray Stevens | **Department:** Finance

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

- Baseline established through Onboard survey completed in June, 2025. The baseline value in percent of the number of riders surveyed who reported awareness of the agency's zero emission fuel efforts is 63.4%.
- Improving tracking and monitoring process of capital investments and internal operational processes that serve as "green energy" solutions. This would be done in collaboration with the department heads in the Agency.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP3 – Strategic Agency Goal 1b: Improve public awareness to the benefit of (ZET) from 63.4% to 85% by 8/1/2026.

Goal Owner: Ray Stevens

Department: Finance

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

- SP3 – Strategic Agency Goal 1a complete. Next phase for SP3 Goal 1b is to develop and conduct a public education campaign to increase awareness of the agency's zero emission fuel efforts. Finance initiated contact with Marketing Consultant 12/30/2025 to provide a quote on the structure of public awareness campaign.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP4 – Strategic Agency Goal 1: Implement strategies towards achieving zero assaults (physical and verbal) of bus operators on revenue vehicles and at facilities by November 9, 2027.

Goal Owner: Bryan Valenzuela | **Department:** Safety

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

- De-escalation training completed August 2025.
- Since the implementation of bus barriers, de-escalation training, and collaboration with local jurisdictions to enforce trespassing municipal codes, there has been a measurable decrease in transit worker assaults.
- Per the Agency Safety Plan requirements, SunLine is committed to developing ongoing training programs that reinforce de-escalation techniques for both new hires and existing staff. These refresher courses will ensure employees maintain the skills necessary to effectively manage challenging situations and promote a safe environment for passengers and operators.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP4 – Strategic Agency Goal 2a: Establish a baseline of customer, potential customer and community perception of SunLine's system safety by June 20, 2026.

Goal Owner: Carmen Cubero | **Department:** Marketing

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: June 30, 2026

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

- Staff initiated efforts to establish a baseline of customer, potential customer, and community perception of SunLine's system safety. Early work has focused on defining key safety perception indicators and preparing to leverage existing Transit app survey tools to collect rider feedback. Additional outreach methods may be used to supplement input from potential customers, with baseline results anticipated by June 20, 2026.
- Added Marketing to the list of recipients for the Transit App data. Marketing to review and analyze data and set performance targets.
- Marketing assimilating data gained from other survey and customer response systems, including the Mystery Rider Program, pre/post travel training assessments, review of coms and unsolicited feedback from the community.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP4 – Strategic Agency Goal 2b: Improve perception of system safety/security by December 30, 2028.

Goal Owner: Carmen Cubero | **Department:** Marketing

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

- TBD; predicated on accomplishing Strategic Priority 4, Strategic Goal 2a.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP4 – Strategic Agency Goal 4: Implement strategies towards achieving zero preventable passenger injuries by November 30, 2027

Goal Owner: Bryan Valenzuela | **Department:** Safety

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

- ADA Guru provided operations supervisors with wheelchair securement training in August 2025.
- Safety staff reviewing securement training for all staff with PERMA to ensure the staff-focused wheelchair securement training and program meets required standards. The goal is to identify opportunities to enhance compliance, improve passenger safety, and ensure industry best practices are met.
- A total of 10 safety meetings scheduled for January 2026, focusing on defensive driving. By proactively implementing administrative controls, such as training, reminding staff of the procedures, sharing lessons learned, and applying industry best practices, the objective is to reduce the likelihood of passenger injuries and enhance overall operational safety.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP5 – Strategic Agency Goal 1: Improve agency wide communication from 3.92/7 to 5.5/7 on the Voice of the Employee (VOE) survey (2024 question #25) by June 30, 2027.

Goal Owner: Tamara Miles | **Department:** Human Resources

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

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

- Town Halls were held in July and December.
- July Town Hall topics included the Mission Statement, Six Strategic Priorities, Near-Miss and Safety Concern Reporting, Employee safety Initiatives, Workforce Investment, New Communication Initiatives, and the FY26 Operating and Capital Budgets.
- December Town Hall discussions focused on the Mission Statement, Vision Statement, Core Values, the Near-Miss/Safety Concern Reporting Program, Ongoing Employee Safety Projects, the ATLAS Mentorship Program, the Comprehensive Operational Analysis, and Accrual Changes.
- Management is meeting with their teams to discuss upcoming agency changes and to gather employee input.
- Between July and December, Insight Strategies and Human Resources held staff sessions to present upcoming performance review changes and to answer questions and solicit input.
- Plan the implementation of the next VOE survey.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP5 – Strategic Agency Goal 2: Ensure that all key positions have one or more qualified candidates to assume the roles, duties and responsibilities of (Executive leadership) positions as measured by a score of 4 or 5 on the readiness scale by June 30, 2030.

Goal Owner: Greg Wildman	Department: Strategic Alignment
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Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: Continuous

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

- Hanson Bridgett conducted on-site training for all levels of management for workplace investigations.
- Supervisory and management staff continued skill development through Lorman online training content.
- Two in-person training programs were provided to supervisory and management staff through the PACE program at the College of the Desert.
- Nine Dispatchers for paratransit and fixed route are participating in an introductory program to develop basic supervisory knowledge and skills as part of the career ladder to prepare them for advancement to roles as supervisors. Training is provided online and using roundtable discussions.
- The Chief Financial Officer and Chief Transportation Officer completed their executive coaching program provided through Insight Strategies.
- Readiness scale in development.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP5 – Strategic Agency Goal 3: Improve on perception and transparency between management and staff as measured by an increase from 4.65/7 to 5.5/7 (an improvement of 6.5%) on the VOE Survey (2024 question #26) by December 30, 2026.

Goal Owner: Tamara Miles | **Department:** Human Resources

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

- Town Halls were held in July and December.
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- Planning the next VOE survey is underway.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP5 – Strategic Agency Goal 4: Increase employee perception of participation in decision making from 4.65/7 to a 5.5/7 (an improvement of 6.5%) on the VOE Survey (2024 question #26) by December 30, 2026.

Goal Owner: Tamara Miles | **Department:** Human Resources

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

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

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- Town Halls were held in July and December.
- July Town Hall topics included the Mission Statement, Six Strategic Priorities, Near-Miss and Safety Concern Reporting, Employee safety Initiatives, Workforce Investment, New Communication Initiatives, and the FY26 Operating and Capital Budgets.
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Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP5 – Strategic Agency Goal 5A (revised): Improve employee productivity by decreasing unscheduled absenteeism from CY 2025 baseline data by 10% by December 30, 2026 (limited to Operations/bargaining unit staff only).

Goal Owner: Tamara Miles	Department: Human Resources
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Goal status as of 12/30/25	<input type="checkbox"/> Completed and closed	<input type="checkbox"/> In place/monitoring; expected closure: December 30, 2026
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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
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Progress Update: January 2026

- New MOU went into effect in April 2025, which incorporated the requirements of CA SB 616, the New Paid Sick Leave Requirements, preventing employers from disciplining employees for using accrued and available sick time.
- The agency is enforcing the new MOU attendance policy, which defines 1) each day of absence as a singular occurrence (previously, multiple consecutive days of absence were considered 1 occurrence), and 2) allows the agency to engage in disciplinary action with bargaining unit members when an occurrence exceeds their accrued sick time.
- Because of the change in the MOU regarding how the agency accounts for absences, a new baseline metric will be established using data gathered under the new set of rules.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP5 – Strategic Agency Goal 5B: Improve employee productivity by reducing workers compensation claims.

Goal Owner: Tamara Miles | **Department:** Human Resources

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

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

- Staff from Human Resources, Safety, Operations, and Maintenance meet bi-weekly to review workers' compensation claims.
- Available video footage is reviewed and discussed.
- Accident/incident causation is analyzed.
- Employees involved in the accident/incident are interviewed to review details, including viewing video footage and identifying when/where the incident occurred.
- A detailed root cause analysis is conducted to identify contributing factors and prevent recurrence.
- Corrective actions are implemented, and retraining is provided when necessary.
- As of 12/30/25, a positive downward trend in claims occurred for calendar year 2025.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP5 – Strategic Agency Goal 6: Develop an updated performance management process by December 31, 2025.

Goal Owner: Tamara Miles | **Department:** Human Resources

Goal status as of 12/30/25 Completed and closed In place/monitoring; expected closure: June 30, 2026

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

- 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.
- Full implementation of the new performance management system expected by June 30, 2026.

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP6 – Strategic Agency Goal 1: Increase revenue from grants and sales as measured by meeting our fiscal year obligations without the use of LTF reserves to be completed by the end of each fiscal year (ongoing).

Goal 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: Ongoing	
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 completed the draft of the 10-year financial outlook which will guide the decisions of the agency and the FY27 operating and capital budget. The 10-year financial outlook will be completed in January 2026.• Staff engaged new state and federal advocacy firms as well as a grant writing firm. These changes assist the agency be more aware and involved in regulations that shape transit funding and allow SunLine to expand its reach of competitive grant opportunities.	

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP6 – Strategic Agency Goal 2: Establish a 10-year long term financial plan that balances transportation needs with available resources and prioritizes long-term sustainability in alignment with long-term operating and capital needs identified through the planning process to be completed by December 31, 2025.

Goal Owner: 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: January 31, 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">• 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.	

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP6 – Strategic Agency Goal 3a: Establish a comprehensive list of system wide fixed assets in the agency's enterprise asset management system to be completed by July 31, 2025.

Goal Owner: David Legarreta	Department: Finance
Goal status as of 12/30/25 <input type="checkbox"/> Completed and closed <input checked="" type="checkbox"/> In place/monitoring; expected closure: Ongoing	
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 have implemented changes within the enterprise asset management system to ensure all required asset information is included within each individual asset profile.	

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP6 – Strategic Agency Goal 3b: Establish a focus on state of good repair through the capital investment planning process to ensure that no more than 10% of all system wide assets exceed their useful life benchmark by December 30, 2027.

Goal Owner: David Legarreta	Department: Finance
Goal status as of 12/30/25	<input type="checkbox"/> Completed and closed <input checked="" type="checkbox"/> In place/monitoring; expected closure: December 30, 2027
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	
• A full list of capital assets will be incorporated in the FY27 capital planning process in January 2026 to ensure that aging assets are prioritized for replacement.	

Attachment 1: Board of Directors Update: FY 2026 SunLine Strategic Priorities and Goals

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.

SP6 – Strategic Agency Goal 4: Achieve 100% of resource requests align with the agency's strategic plan (ongoing).

Goal Owner: Luis Garcia | **Department:** Finance

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

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

- Budget requests with justification related to our strategic priorities were incorporated into the FY26 budgeting process and will continue going forward.
- Strategic priorities have been incorporated into board reports to ensure that agency activities are clearly aligned with the approved priorities.