



SunLine Transit Agency/
 SunLine Services Group
 December 4, 2024
 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

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

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

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

ITEM

RECOMMENDATION

3. ROLL CALL

4. CLOSED SESSION

a) CONFERENCE WITH LEGAL COUNSEL—ANTICIPATED LITIGATION

Significant exposure to litigation pursuant to Section 54956.9(d)(2): one potential case

5. RECONVENE TO OPEN SESSION AND REPORT OUT FROM CLOSED SESSION

6. FINALIZATION OF AGENDA

7. 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.

8. PRESENTATIONS

a) Proclamation Recognizing Board Members

b) Golf Cart Parade Recognition

c) **January Service Change Presentation**

(Staff: Paul Mattern, Chief Planning Officer)

(PAGE 6-22)

d) **ABBG Introduction**

(Staff: Paul Mattern, Chief Planning Officer)

(PAGE 23-37)

9. BOARD MEMBER COMMENTS

RECEIVE COMMENTS

10. 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

10a) Acceptance of Checks \$1,000 and Over Report for
September 2024

(PAGE 38-42)

10b) Acceptance of Credit Card Statement for
September 2024

(PAGE 43-57)

<u>ITEM</u>	<u>RECOMMENDATION</u>
10c) Acceptance of Monthly Budget Variance Report for September 2024	(PAGE 58-62)
10d) Acceptance of Contracts Signed in Excess of \$25,000 Report for September 2024	(PAGE 63-64)
10e) Acceptance of Union & Non-Union Pension Investment Asset Summary September 2024	(PAGE 65-76)
10f) Acceptance of Ridership Report for September 2024	(PAGE 77-80)
10g) Acceptance of SunDial Operational Notes for September 2024	(PAGE 81-83)
10h) Acceptance of Metrics for September 2024	(PAGE 84-107)
10i) Acceptance of Quarterly Performance Summary for Q3 of Calendar Year 2024	(PAGE 108-112)
10j) Acceptance of Board Member Attendance Report for October 2024	(PAGE 113-114)
10k) Approval of Joint Board Meeting Minutes for October 23, 2024	(PAGE 115-118)
10l) Acceptance of SSG/SRA Checks \$1,000 and Over Report for September 2024	(PAGE 119-120)
10m) Acceptance of SSG Monthly Budget Variance Report for September 2024	(PAGE 121-123)
10n) Acceptance of Taxi Trip Data Report – September 2024	(PAGE 124-125)
11. FISCAL YEAR 2024 AUDIT REPORTS (Lynn Malotto, Chair of Finance/Audit Committee; Staff: Luis Garcia, Chief Financial Officer)	RECEIVE & FILE (PAGE 126)
12. CALIFORNIA TRANSIT TRAINING CONSORTIUM AGREEMENT APPROVAL (Lynn Malotto, Chair of Finance/Audit Committee; Staff: Luis Garcia, Chief Financial Officer)	APPROVE (PAGE 127-128)
13. APPROVE REVISED SUNLINE PUBLIC TRANSPORTATION AGENCY SAFETY PLAN (Glenn Miller, Chair of Board Operations Committee; Staff: Bryan Valenzuela, Chief Safety Officer)	APPROVE (PAGE 129-201)
14. SECOND READING AND ADOPTION OF SUNLINE SERVICES GROUP (SSG) ORDINANCE NO. 2024-02, TAXICAB SERVICE ORDINANCE (Kathleen Kelly, Chair of Taxi Committee; Staff: Jill Plaza, Taxi/Contracted Transportation Services Administrator)	APPROVE (PAGE 202-265)

ITEM

RECOMMENDATION

- 15. **BOARD MEMBER STIPEND INCREASE UPDATE**
(Glenn Miller, Chair of Board Operations Committee;
Staff: Edith Hernandez, Clerk of the Board/Director
of Legislative Affairs) **DISCUSSION**
(PAGE 266)

- 16. **RECEIVE UPDATE ON THE FISCAL YEAR 2024-25
GOALS, STRATEGIC OBJECTIVES AND PRIORITIES
AND PROVIDE FEEDBACK**
(Staff: Mona Babauta, CEO/General Manager) **DISCUSSION**
(PAGE 267-290)

- 17. **LEGISLATIVE UPDATE FOR DECEMBER 2024**
(Staff: Edith Hernandez, Clerk of the Board/Director
of Legislative Affairs) **INFORMATION**
(PAGE 291-292)

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

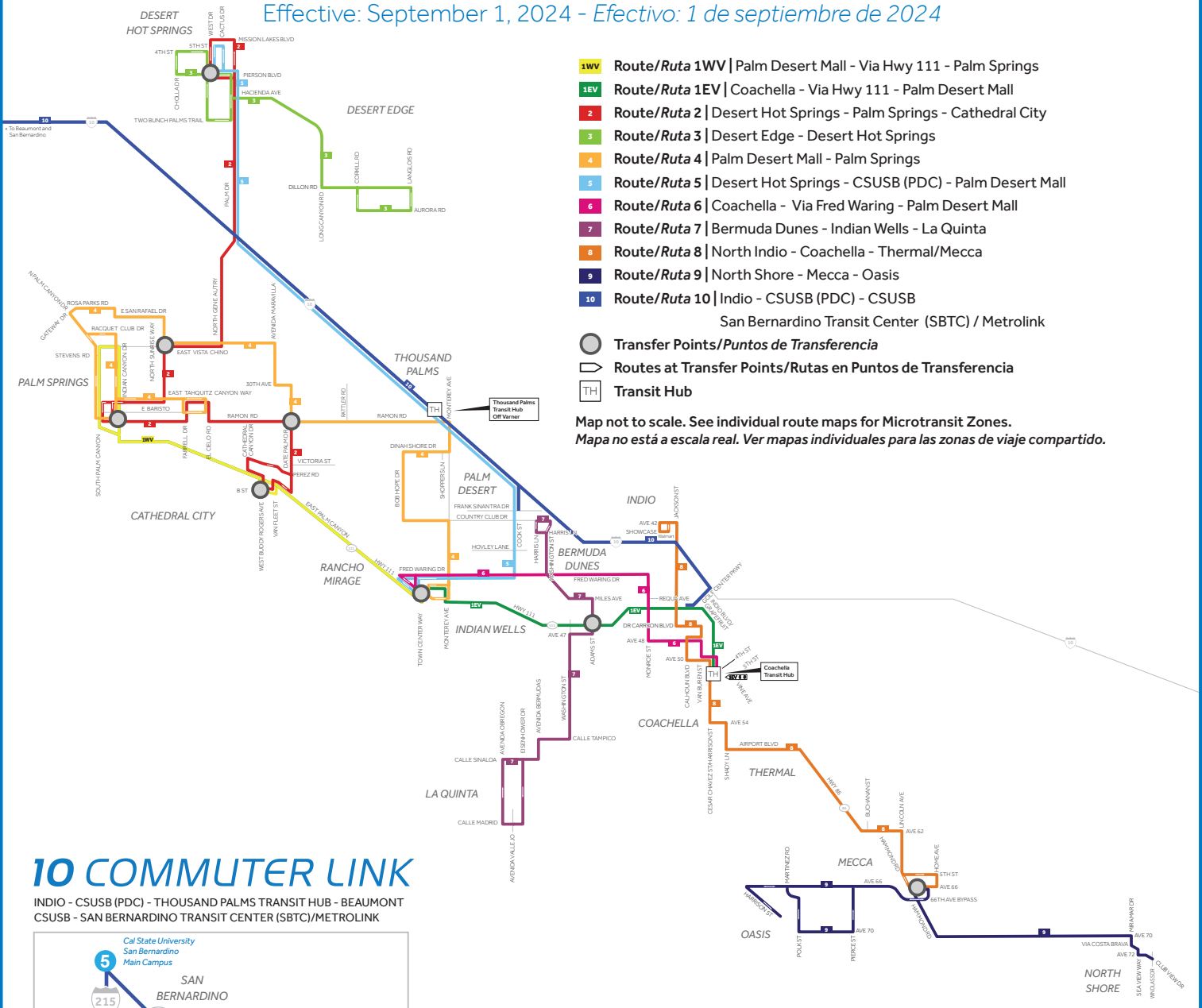
- 19. **NEXT MEETING DATE**

January 22, 2025 at 12 p.m.
Board Room
32-505 Harry Oliver Trail
Thousand Palms, CA 92276

- 20. **ADJOURN**

SYSTEM MAP - MAPA DEL SISTEMA

Effective: September 1, 2024 - Efectivo: 1 de septiembre de 2024



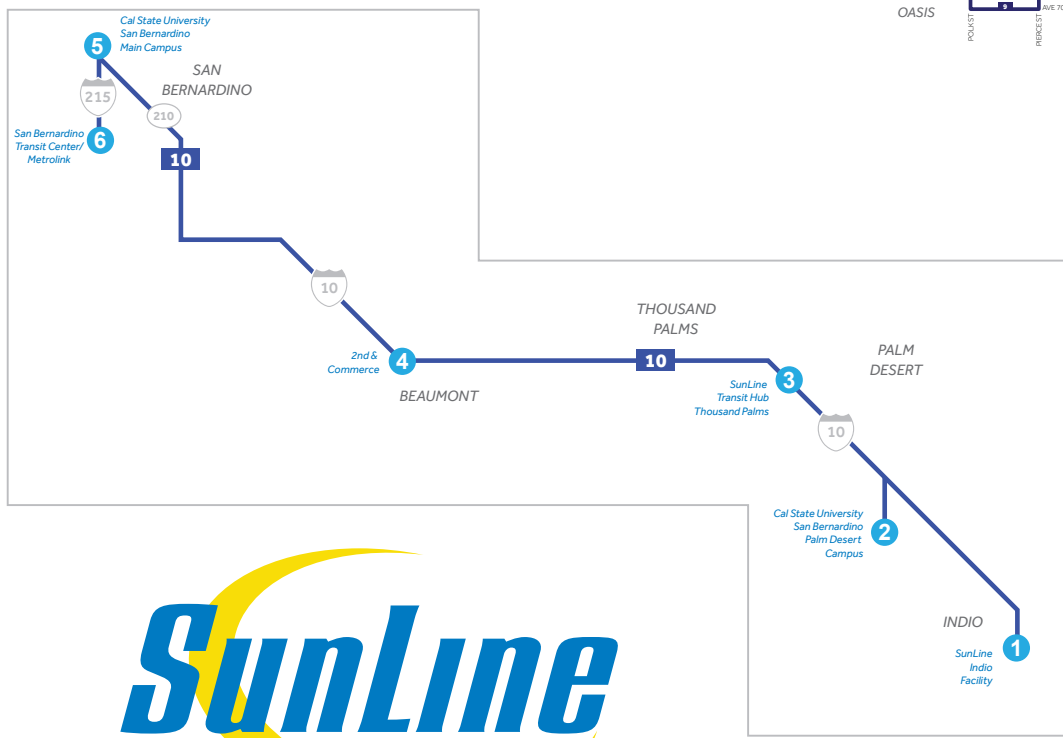
- 1WV** Route/Ruta 1WV | Palm Desert Mall - Via Hwy 111 - Palm Springs
- 1EV** Route/Ruta 1EV | Coachella - Via Hwy 111 - Palm Desert Mall
- 2** Route/Ruta 2 | Desert Hot Springs - Palm Springs - Cathedral City
- 3** Route/Ruta 3 | Desert Edge - Desert Hot Springs
- 4** Route/Ruta 4 | Palm Desert Mall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

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

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

10 COMMUTER LINK

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



760.343.3451 | SunLine.org



Fixed Route January 2025 Service Change

December 4, 2024

- Per our Collective Bargaining agreement with Amalgamated Transit Union Local 1277, we are required to have three (3) service changes per year. These changes go into effect, January, May, and September.

MEMORANDUM OF UNDERSTANDING

BETWEEN

SUNLINE TRANSIT AGENCY

AND

AMALGAMATED TRANSIT UNION
LOCAL 1277

April 1, 2022 through March 31, 2025



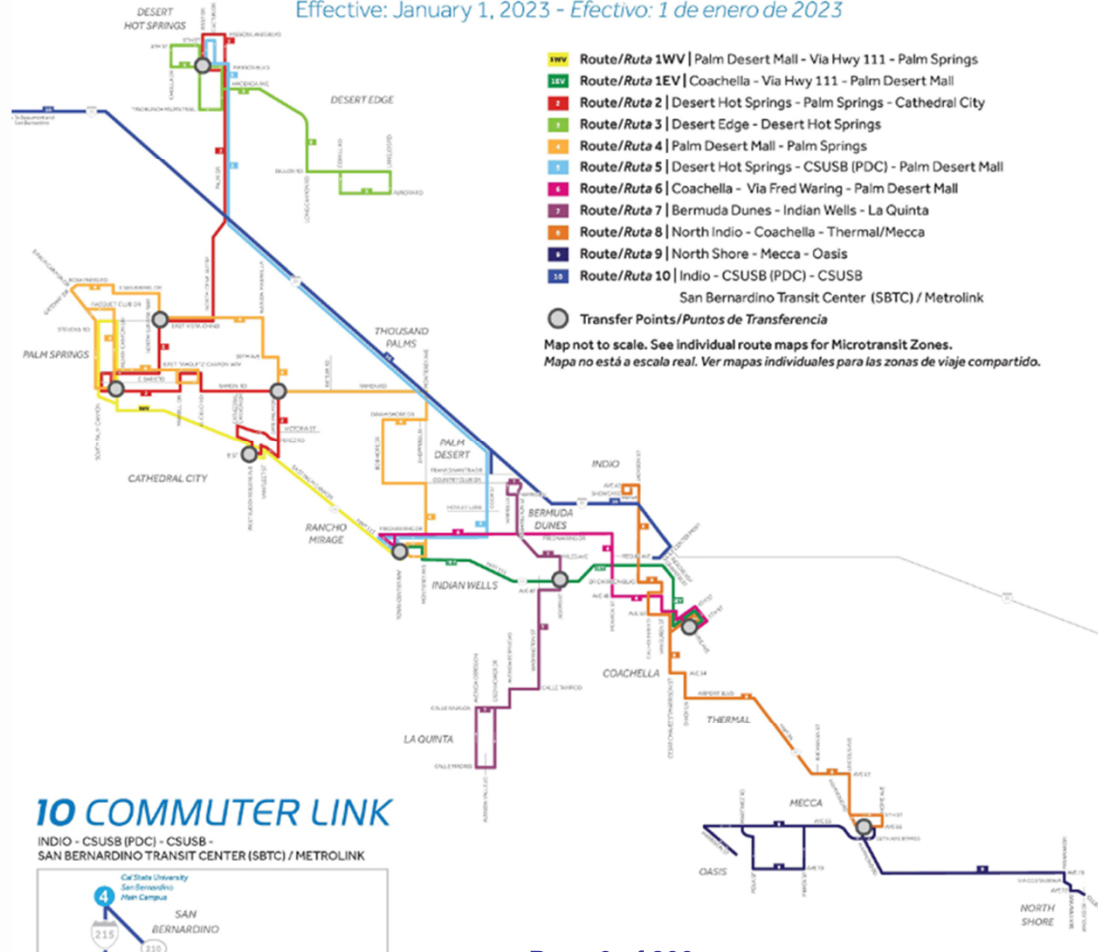
Service Change - Headways

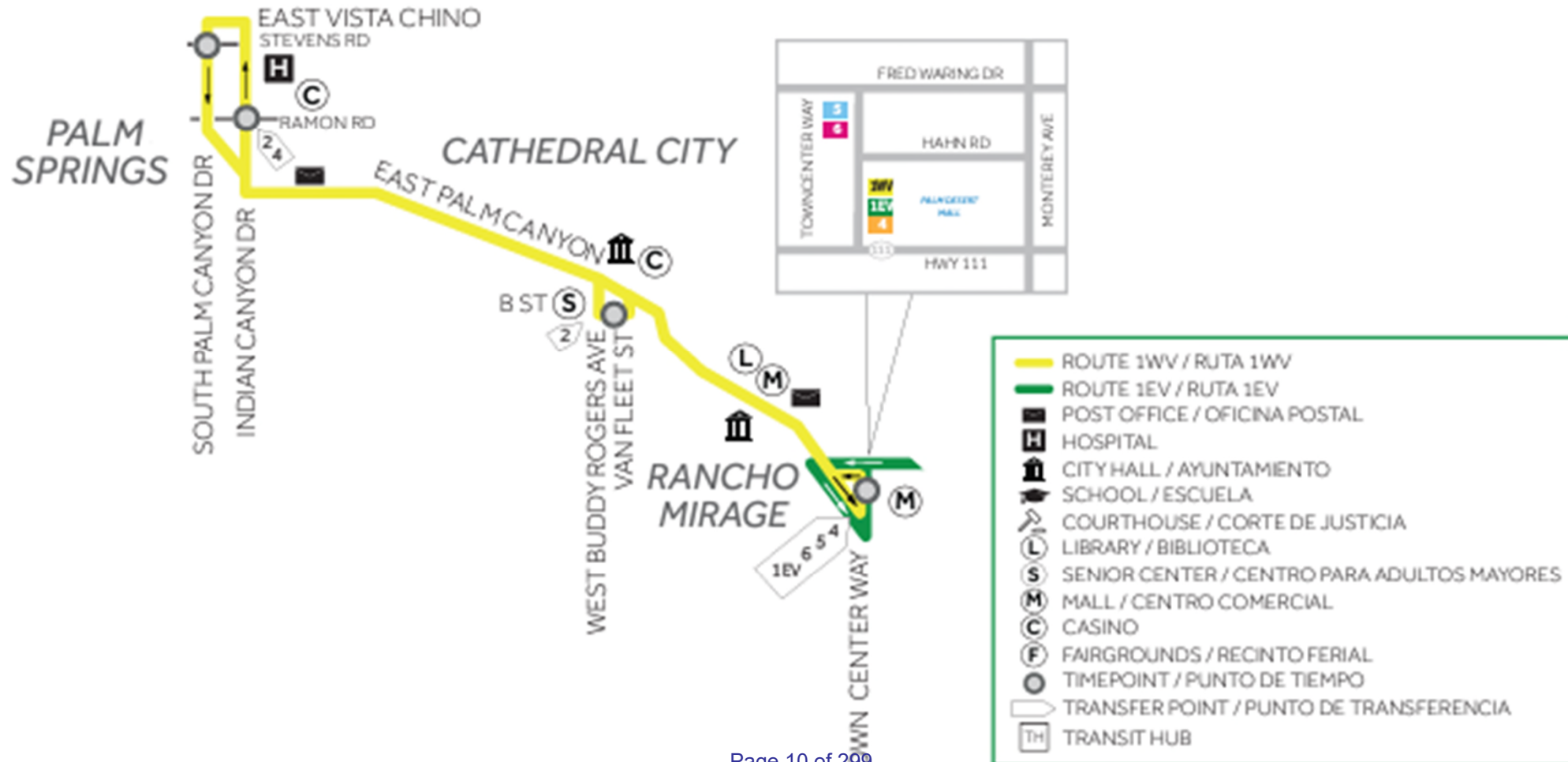
		Effective January 7, 2024		
		Weekday	Saturday	Sunday
1WV	Palm Desert Mall - Palm Springs	30	30	30
1EV	Coachella - Palm Desert Mall	30	30	30
2	Desert Hot Springs - Palm Springs - Cathedral City	30	30	30
3	Desert Edge - Desert Hot Springs	30	60	60
4	Palm Desert Mall - Palm Springs	60	60	60
5	Desert Hot Springs - CSUSB Palm Desert - Palm Desert Mall	60	NS	NS
6	Coachella - Via Fred Waring - Palm Desert Mall	60	NS	NS
7	Bermuda Dunes - Indian Wells - La Quinta	45	90	90
8	North Indio - Coachella - Thermal/Mecca	60	60	60
9	North Shore - Mecca - Oasis	60	60	60
10	Indio - CSUSB-PDC - CSUSB - San Bernardino Transit Center (SBTC)/Metrolink	4 round trips	NS	NS

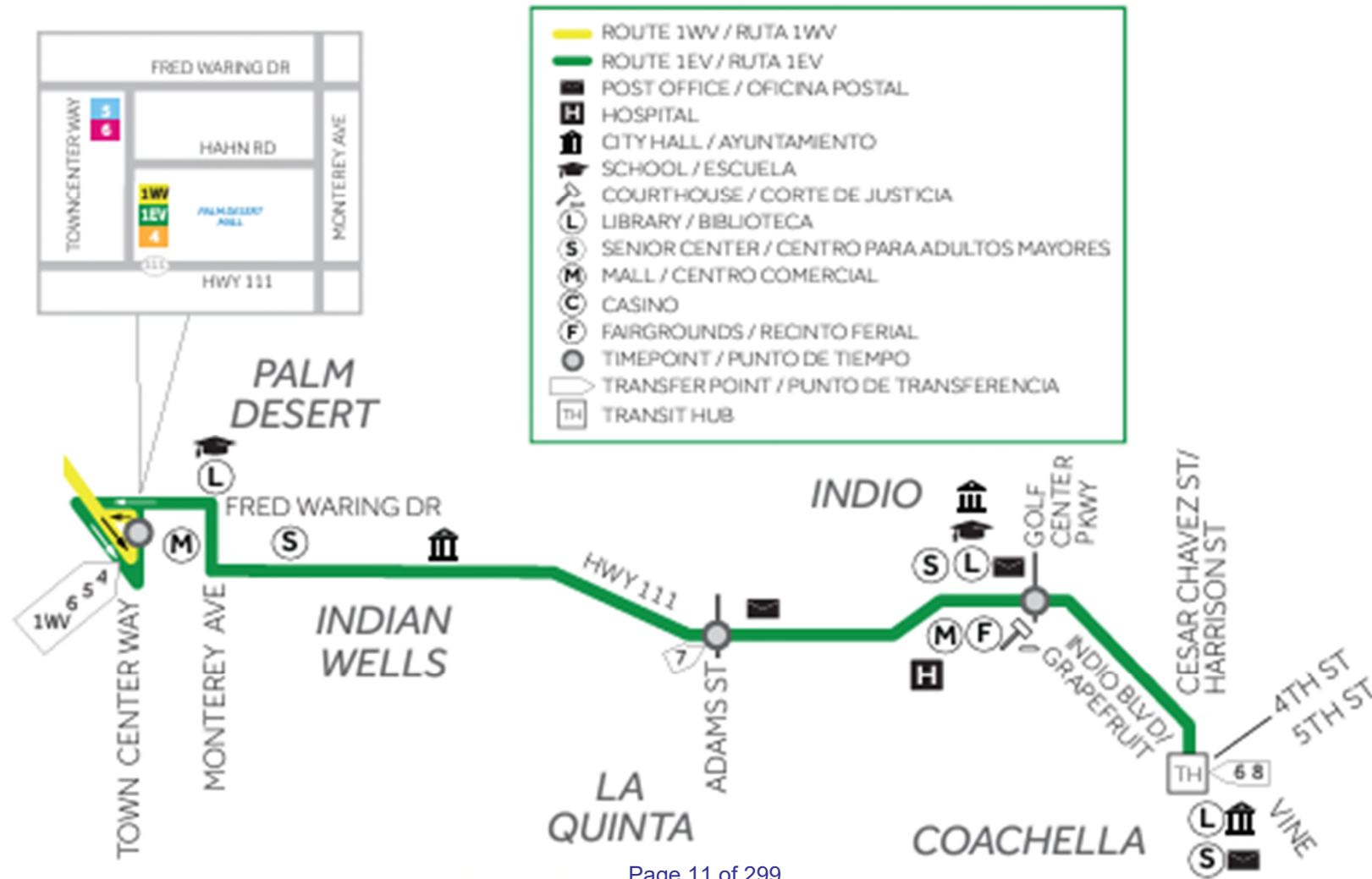
- No change to headways
- No increase to revenue hours that impact the budget

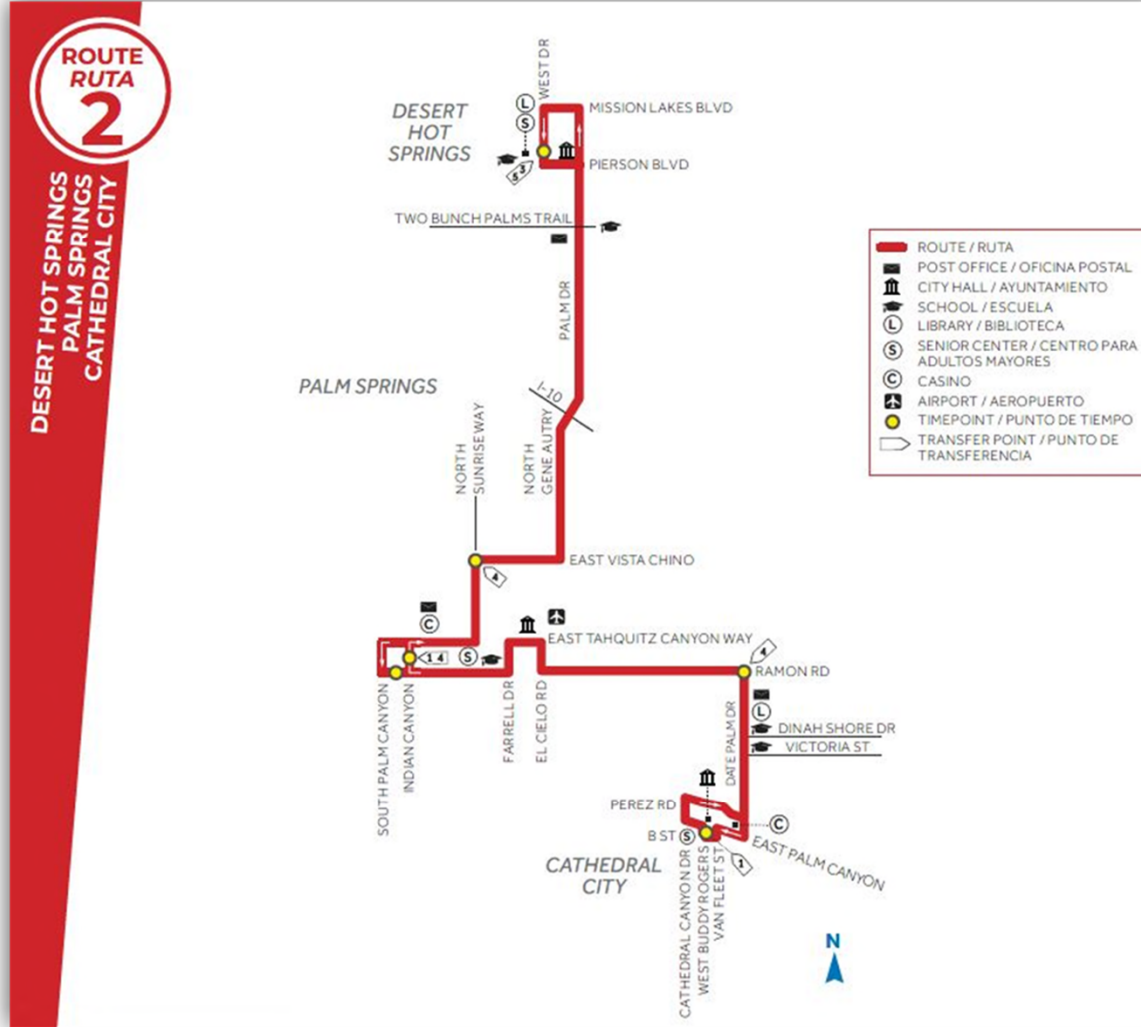
SYSTEM MAP - MAPA DEL SISTEMA

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

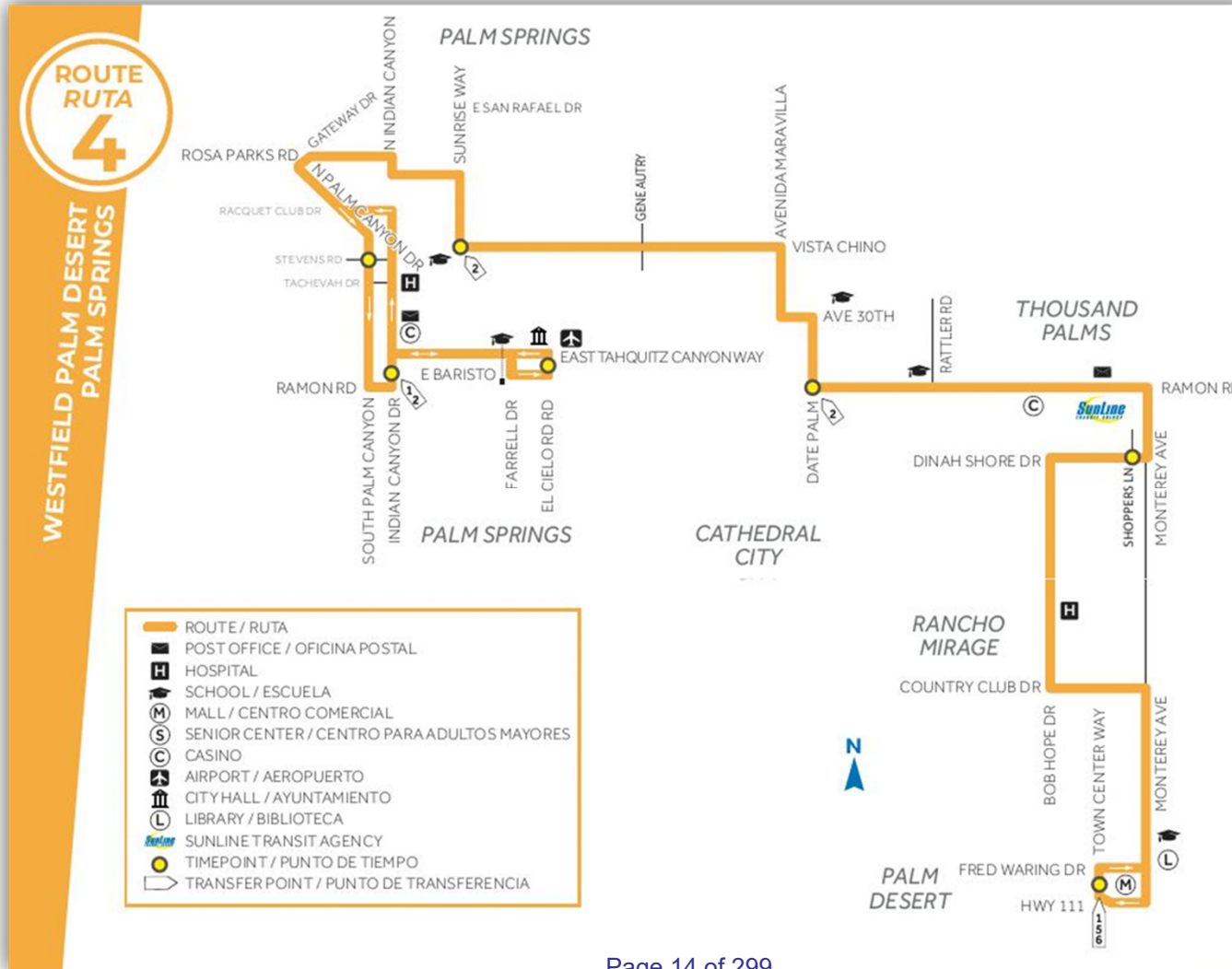


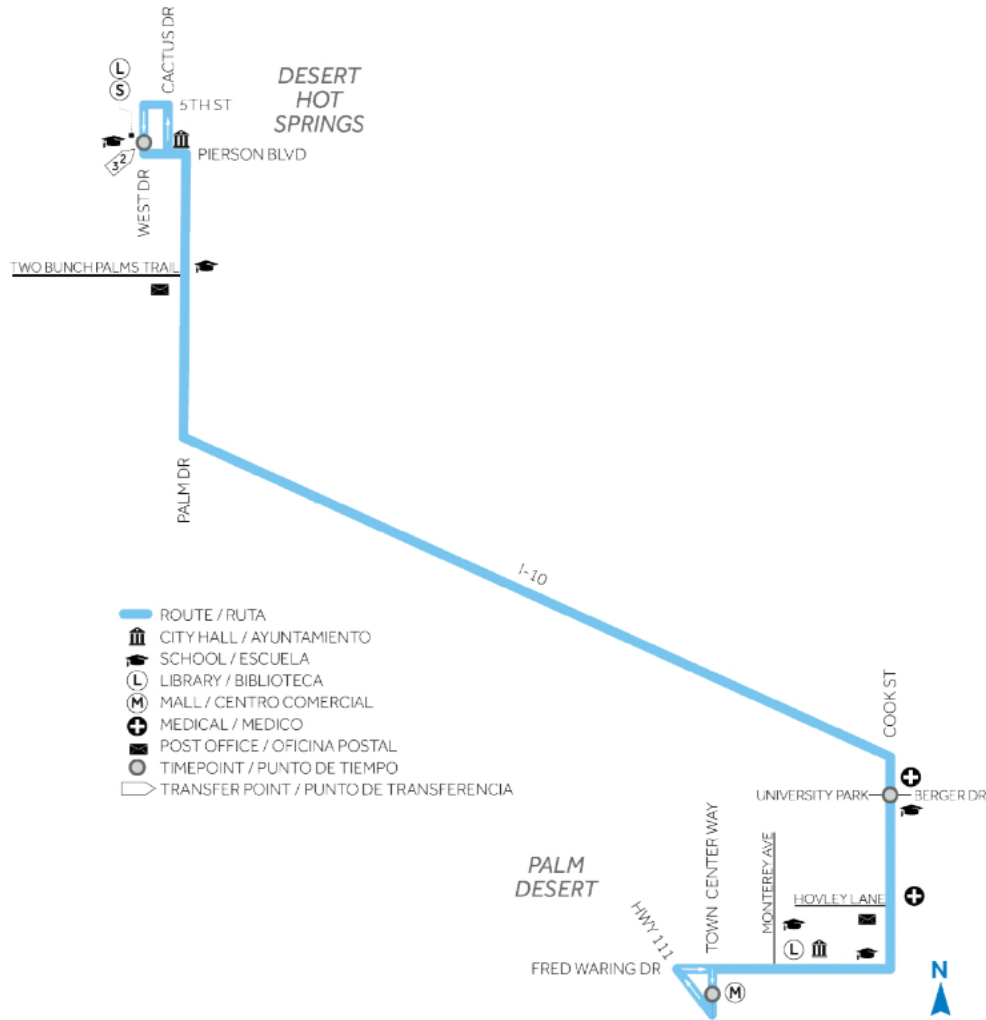




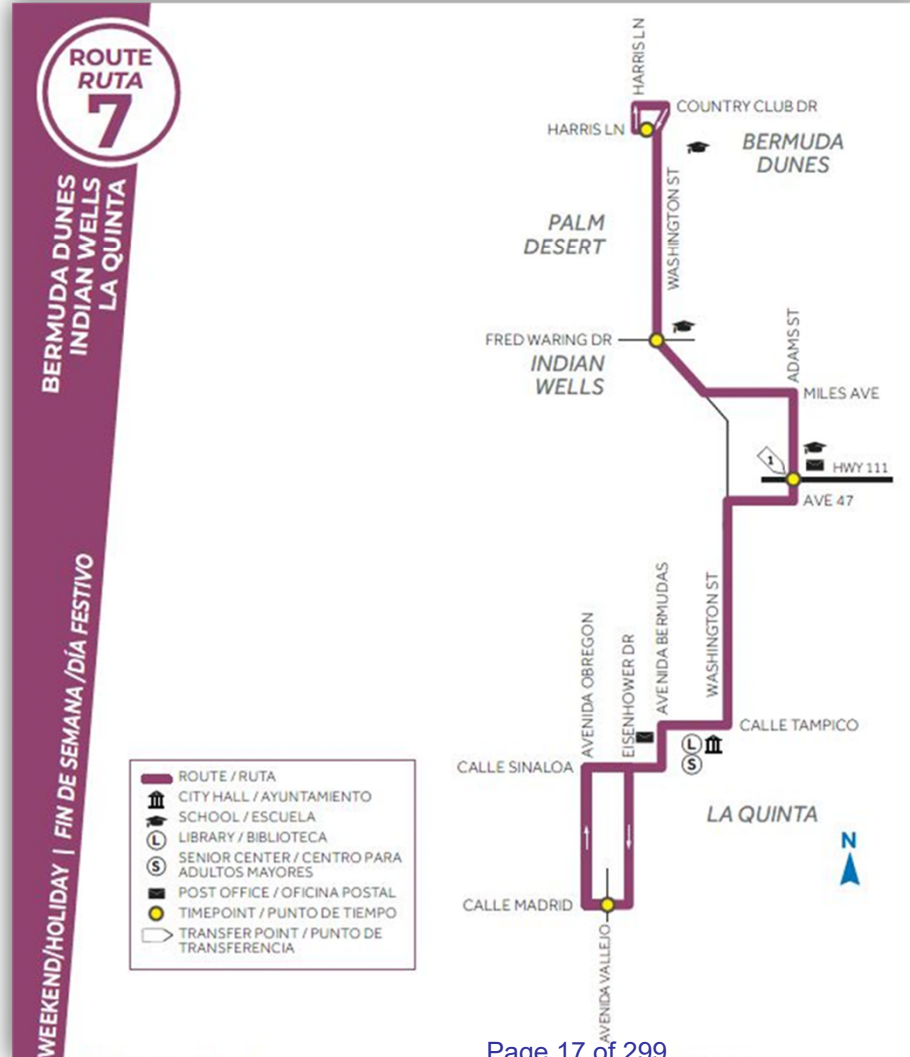






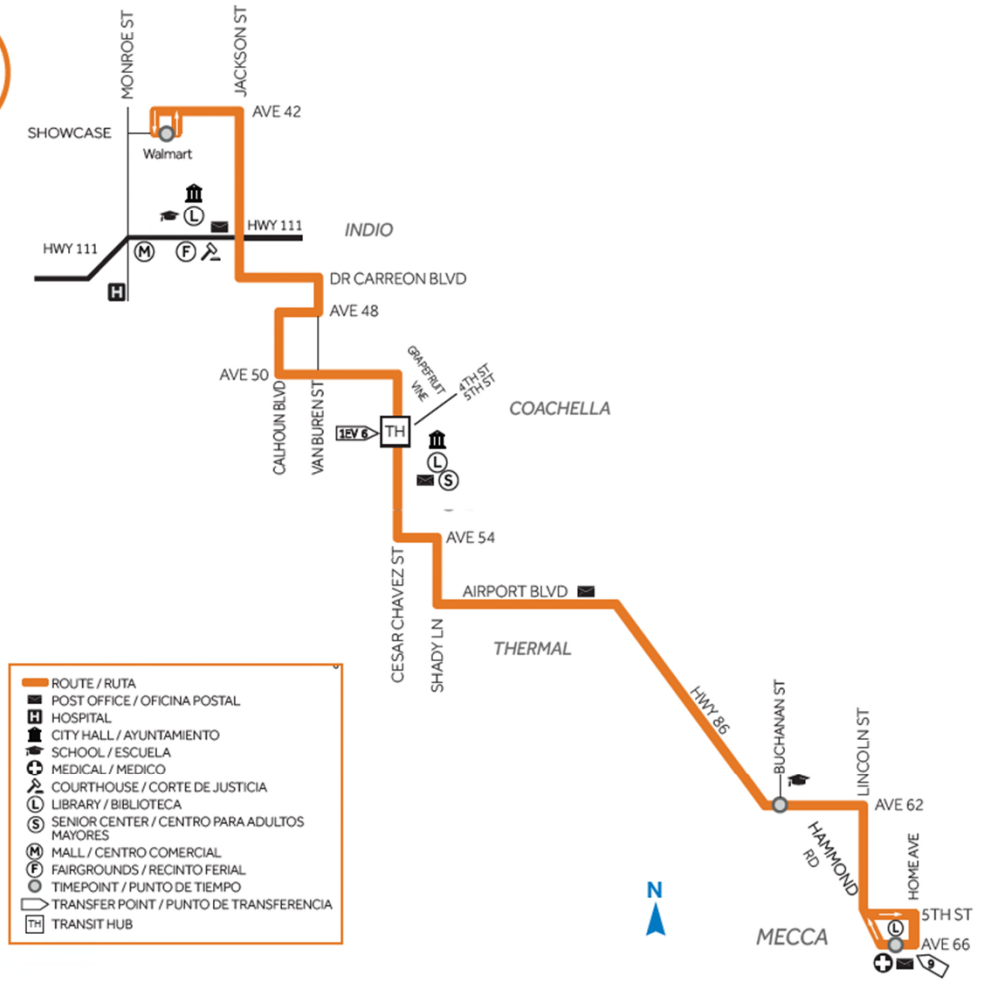




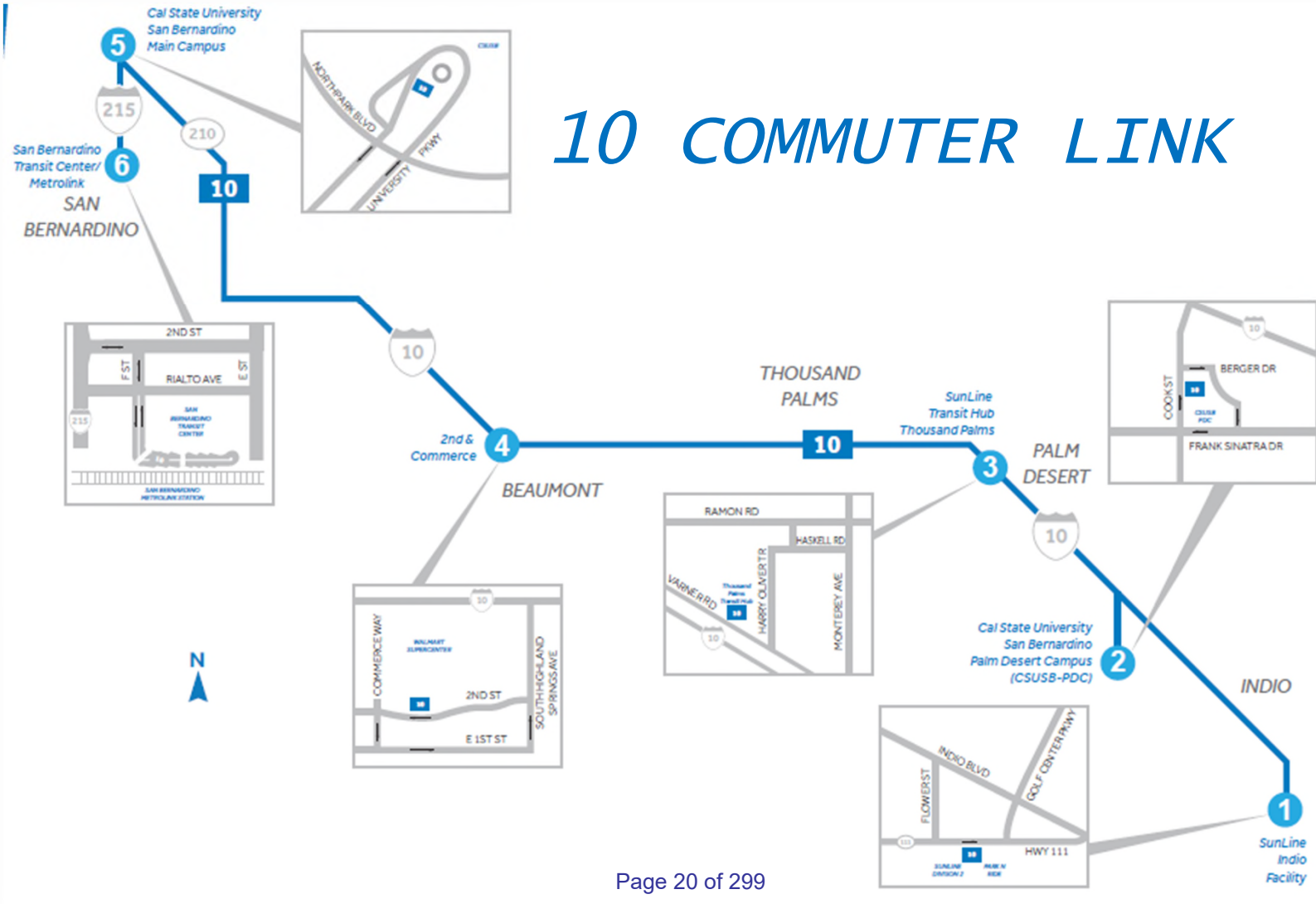


ROUTE RUTA 8

NORTH INDIO
COACHELLA
THERMAL/MECCA







Service Change



Service Changes for January 2025

- 10 Commuter Link Stop at Greyhound Station
- Create timepoint where Route 1WV and Route 2 meet
- Align running times to maintain or improve On Time Performance

Questions?



American Bus Benchmarking Group

Leveraging Benchmarking for Public Transit Excellence

What is Benchmarking?

- Benchmarking is the process of comparing performance metrics to industry best practices or peers to identify areas for improvement.

Key Elements:

- Performance Measurement
- Comparative Analysis
- Continuous Improvement

Why is Benchmarking Important?



Improves Performance:
Identifies strengths and weaknesses.



Encourages Best Practices: Adopts proven strategies from peers.



Supports Decision-Making: Provides data-driven insights.



Fosters Collaboration:
Builds a network of industry professionals.

Benefits of Benchmarking



Increases operational efficiency.








Enhances service quality for riders.



Promotes accountability and transparency.

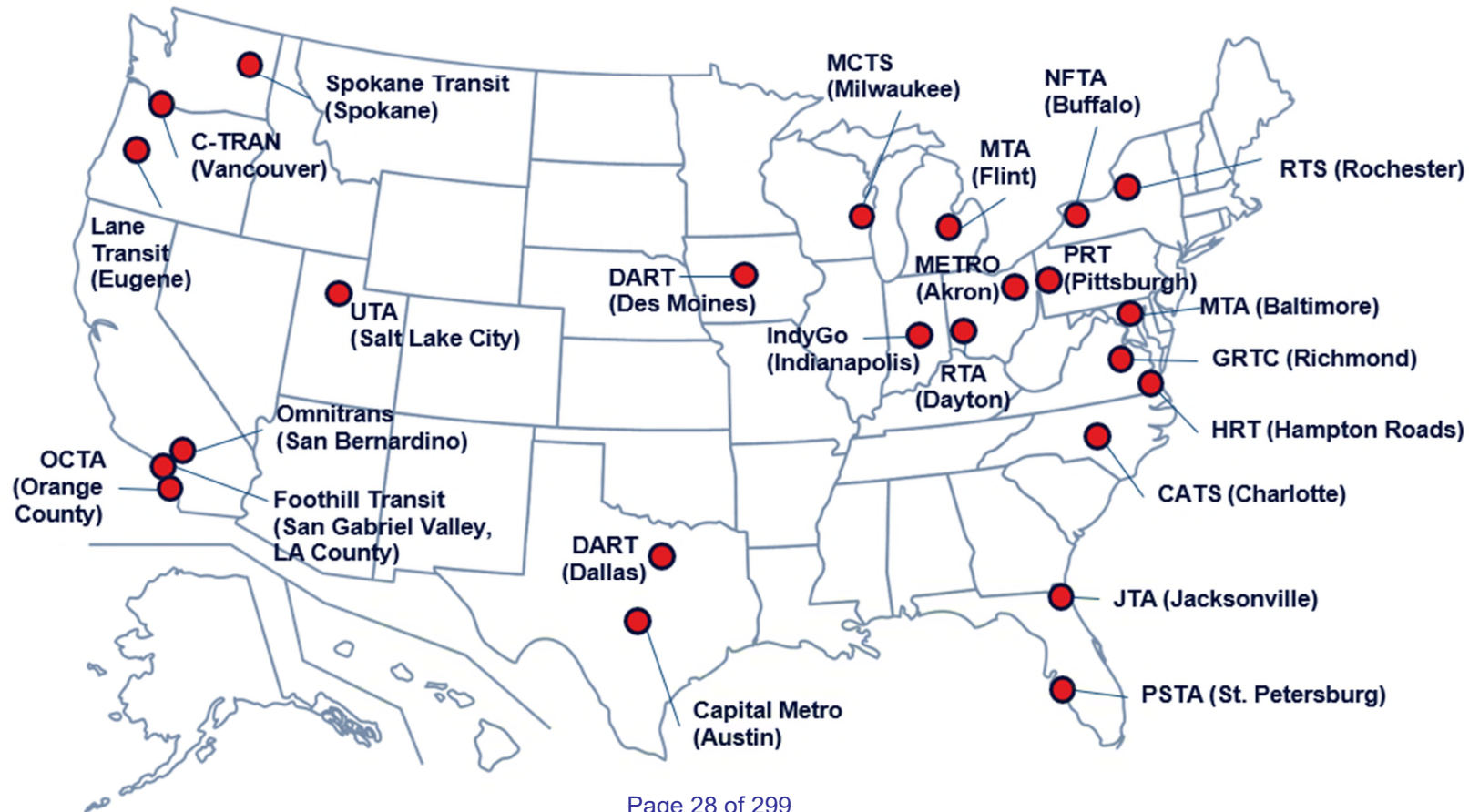


Drives innovation and modernization.

Metro	Bus	Railway	Light Rail	Airports
 <p>COMET</p>	 <p>IBG ABG</p>	 <p>FLIRT ISBERG IMRBG RIAMBIG</p>	 <p>GOAL BOLTS 2023</p>	 <p>ABG</p>
<p>Founded 1994 Including: Hong Kong, London, Beijing, Seoul, New York, Washington DC, Toronto, Barcelona, Paris, Singapore</p>	<p>Founded 2004 Including: New York, Seattle, Washington DC, Paris, Istanbul, Singapore (<i>ABG founded in 2010</i>)</p>	<p>Founded 2010-2016 Including: London, New York, Oslo, Copenhagen, Munich, Tokyo, Sydney</p>	<p>Founded 2016 Including: Seattle, Dallas, Portland, Calgary, Charlotte, San Diego, Toronto</p>	<p>Founded 2017 Including: London, Paris, Hong Kong, Toronto, Los Angeles, Amsterdam</p>

The TSC has 30 years of experience with international public transit benchmarking and now works across five modes.

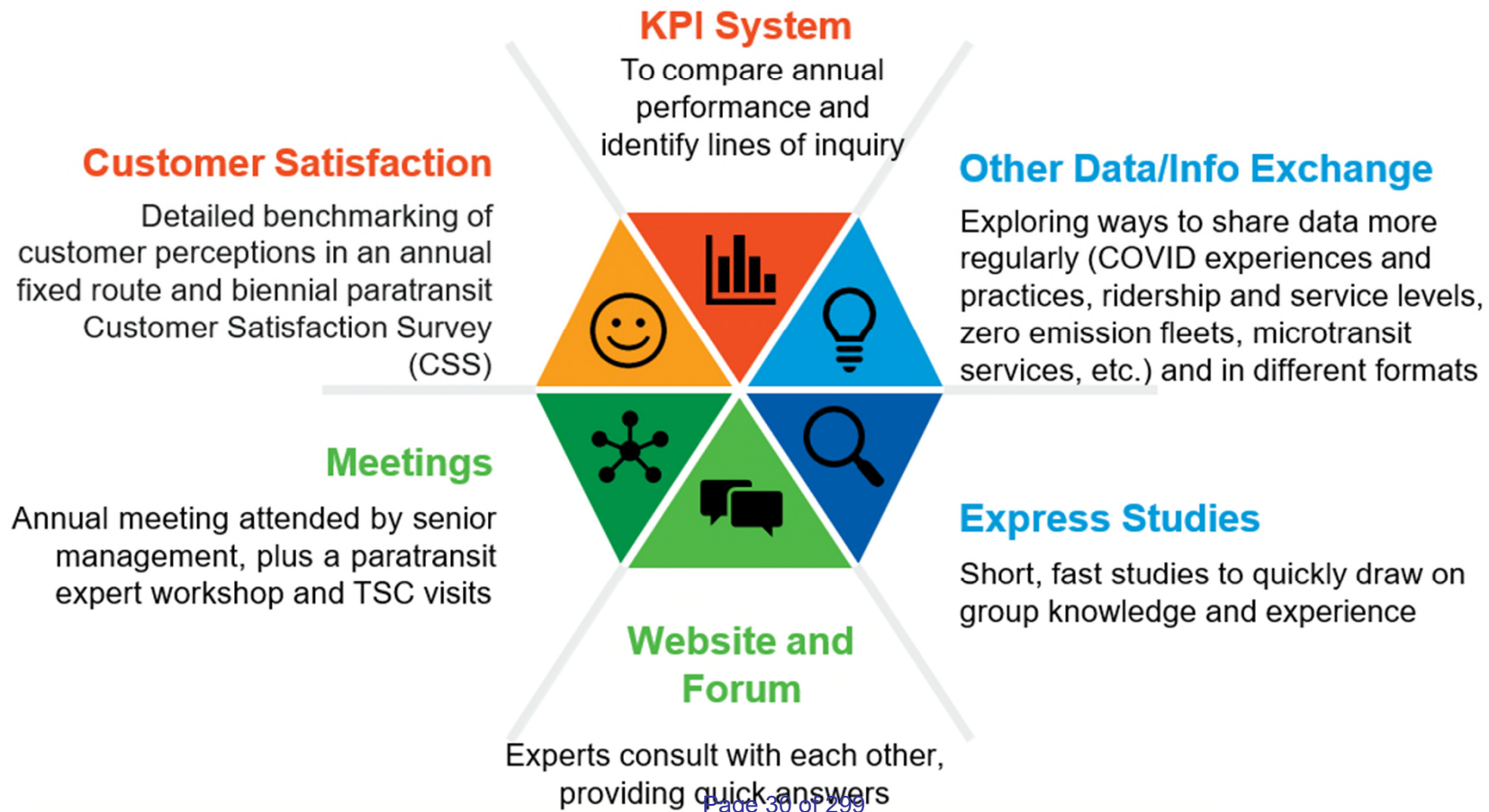
In Phase 14, the ABBG consists of 24 Members in 16 States *(Newest member is Indianapolis IndyGo)*



ABBG Membership & Abbreviations

Ak	Akron METRO RTA (METRO RTA – Akron, OH)	JX	Jacksonville Transportation Authority (JTA – Jacksonville, FL)
As	Capital Metropolitan Transportation Authority (CapMetro – Austin, TX)	Mw	Milwaukee County Transit System (MCTS – Milwaukee, WI)
Ba	Maryland Transit Administration (MTA – Baltimore, MD)	OC	Orange County Transportation Authority (OCTA)
Bf	Niagara Frontier Transportation Authority (NFTA – Buffalo, NY)	Pg	Pittsburgh Regional Transit (PRT – Pittsburgh, PA)
Ch	Charlotte Area Transit Systems (CATS – Charlotte, NC)	Rc	Regional Transit Service (RTS – Rochester, NY)
Da	Dallas Area Rapid Transit (DART – Dallas, TX)	RV	Greater Richmond Transit Company (GRTC – Richmond, VA)
DM	Des Moines Area Regional Transit Authority (DART – Des Moines, IA)	SB	Omnitrans (San Bernardino, CA)
Dy	Greater Dayton Regional Transit Authority (GDRTA – Dayton, OH)	SP	Pinellas Suncoast Transit Authority (PSTA – St. Petersburg, FL)
Eu	Lane Transit District (LTD – Eugene, OR)	ST	Spokane Transit Authority (STA – Spokane, WA)
FH	Foothill Transit (San Gabriel Valley, LA County, CA)	UT	Utah Transit Authority (UTA – Salt Lake City, UT)
FI	Mass Transportation Authority (MTA – Flint, MI)	Vc	Clark County Public Transportation Benefit Area (C-TRAN – Vancouver, WA)
HR	Hampton Roads Transit (HRT – Hampton, VA)		
IG	Indianapolis Public Transportation Corporation (IndyGo, Indianapolis, IN)		

Benchmarking Elements – Annual Cycle with a Combination of KPI Analysis, In-Depth Research, and Information Sharing



Growth & Learning

- G1 Passenger boardings** (5-year % change)
- G2 Revenue vehicle miles / hours**
(5-year % change)
- G3 Average bus load** (vehicle mile & hour)
- G4 Staff refresher training** (by staff category)

Safety

- S1 Vehicle collisions** (vehicle mile and hour)
(preventable, non-preventable, on-property, other, & with vulnerable road users)
- S2 Staff injury rate** (staff work hours)
- S3 Staff lost time from injuries**
(as % of staff work hours)
- S4 Passenger injury rate** (boarding & passenger mile)
- S5 3rd party injury rate** (vehicle mile & hour)
(vulnerable road user injuries)
- S6 3rd party fatality rate** (vehicle mile & hour;
5-year avg) (vulnerable road user fatalities)

Customer

- C1 Customer information at bus stops**
- C2 On-time departure performance** (0 <> +5)
- C3 Planning capacity utilization**
- C4 Seat capacity utilization**
- C5 Lost vehicle miles** (as % of scheduled)
- C6 Missed trips** (as % of scheduled)

Environmental

- E1 Fuel efficiency & effectiveness**
(total vehicle mile, passenger mile,
& capacity mile by fuel type)
- E2 CO2 emissions** (vehicle mile &
passenger mile)

Internal Processes

- P1 Weekday peak fleet utilization**
(fleet not in use split by cause)
- P2 Network efficiency** (revenue miles & hours per
total miles & hours, by non-revenue category)
- P3 Staff productivity** (total vehicle hours & miles
per labor hour, overall & by category)
- P4 Staff absenteeism rate** (by staff category)
- P5 Mean distance/time between road calls**

Financial

- F1 Total cost efficiency** (vehicle mile and hour)
- F2 Operating cost efficiency** (vehicle mile and
hour) (F3 service operation, F4 maintenance,
F5 administration)
- F6 Service operation cost** (revenue vehicle mile
and hour)
- F7 Operating cost effectiveness** (boarding &
passenger mile)
- F8 Operating cost recovery** (fare revenue &
commercial revenue per operating cost)
- F9 Average fare revenue** (boarding &
passenger mile)

Member-led Express Studies – An Opportunity to Gather Information on Specific Topics From Peers

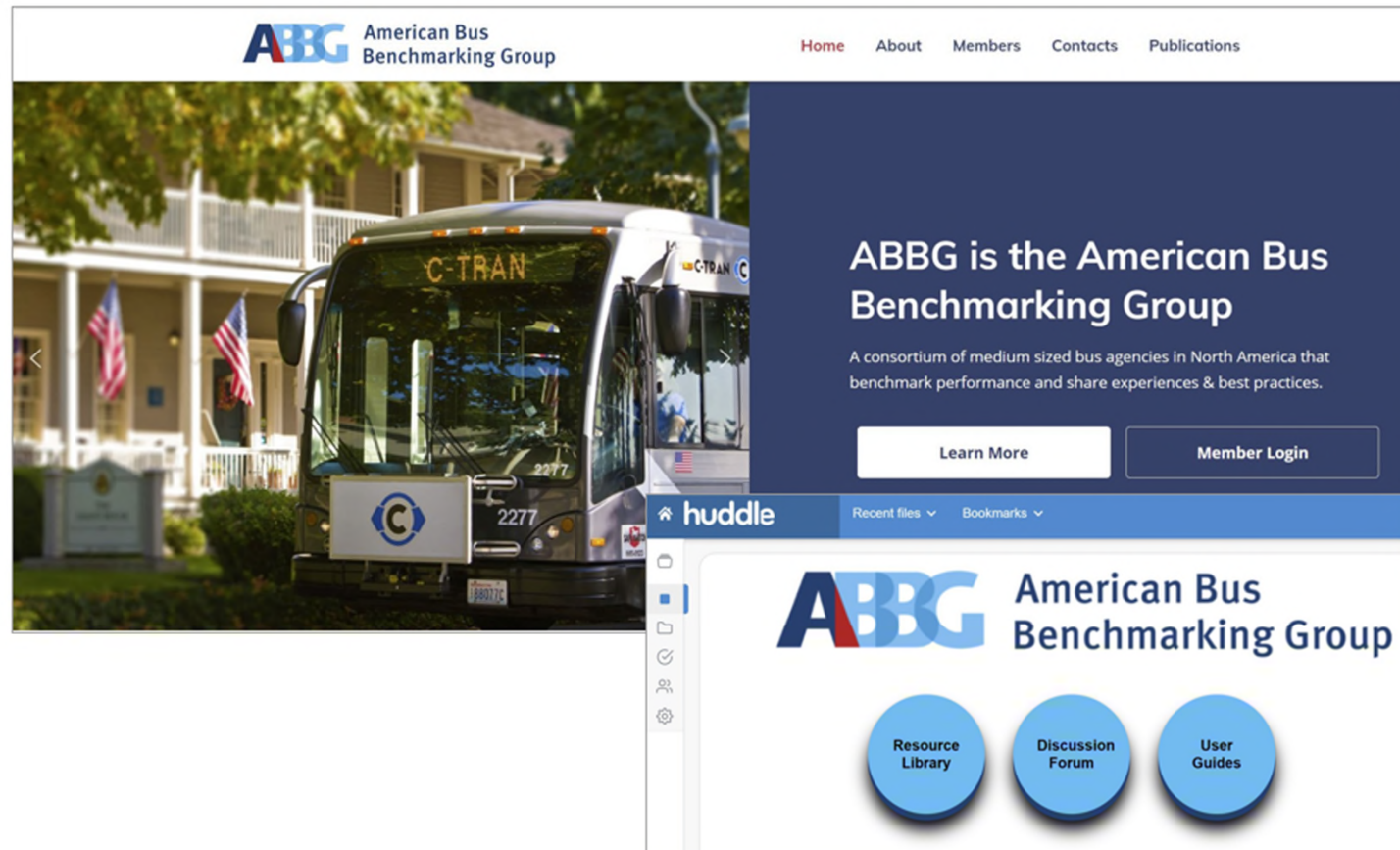
- ▶ Express Studies (formerly Clearinghouse Studies) are short studies initiated by a member agency to collect data on one very specific topic
- ▶ Scope is typically limited to 10-20 questions
- ▶ The study process should take about 2-3 months:
- ▶ The TSC will work with member to refine questions and distribute questionnaire, with a 1-month reply timeframe
- ▶ The TSC will collect responses for the initiating member for collation, analysis, and publishing of the results to all

ABBG Express Studies

- Marketing Communications & Social Media
- Administration Cost Reporting
- Talent Acquisition
- Absenteeism
- Fare History & Structure
- Software Applications
- Training
- Paratransit Vehicle Types & Capacity
- Staff Turnover
- Maintenance Inventory Mngt
- Security
- On-Demand Services
- Workforce Demographics and Employment Activities

Secure Website on Huddle Platform, Invaluable Tool for Fast Info Exchange, accessible via www.americanbusbenchmarking.org

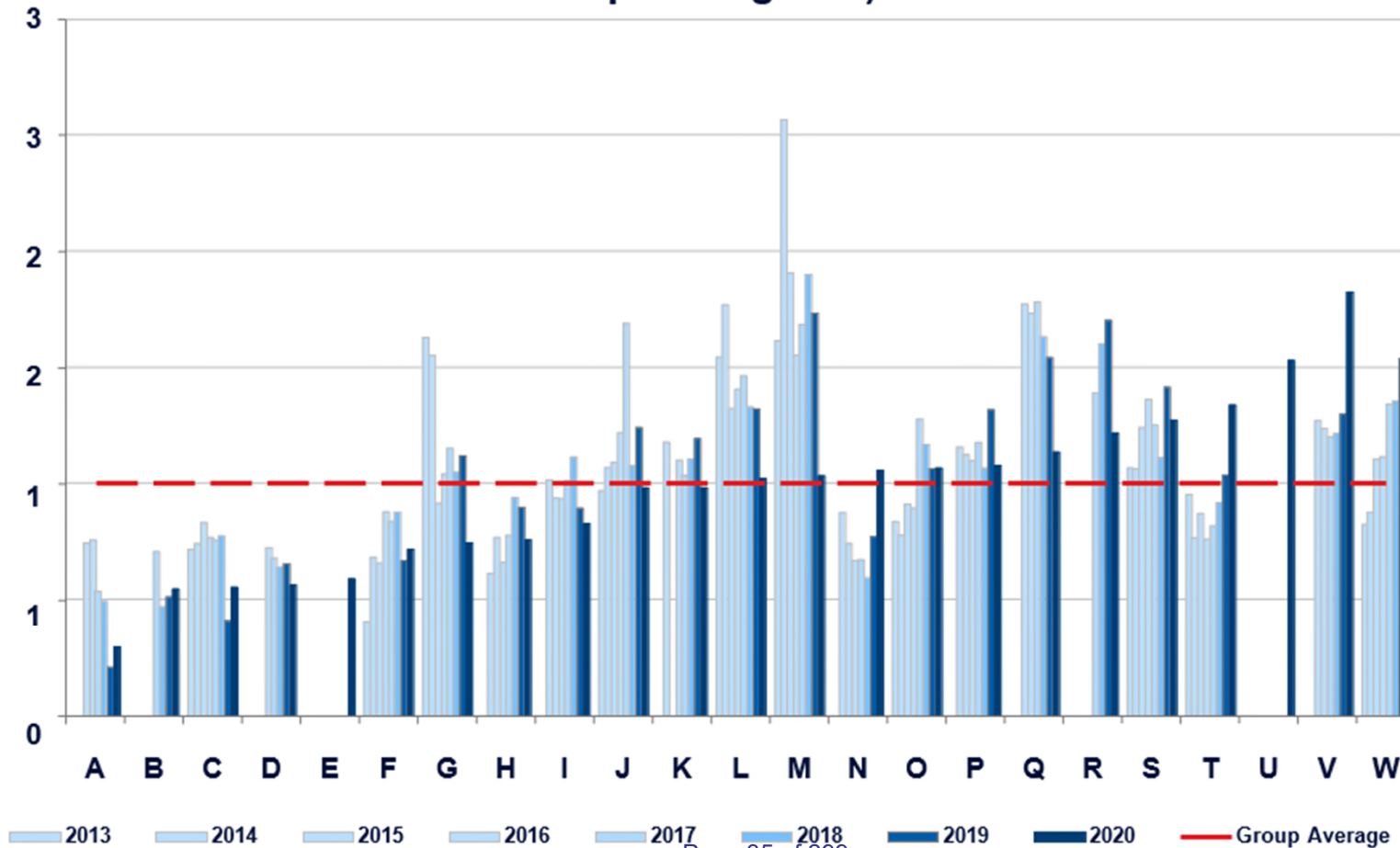
- ▶ Website discussion forum provides fast information exchange between peers, often leading to “quick wins”
- ▶ Resource library makes all group materials accessible, including data and reports



Common benefits of using the forum – how your responses make a difference!

- 1 Benchmark**
 - Benchmark something not covered by ABBG data
 - Find out if most other agencies do NOT do something
- 2 Market research**
 - Identify which software/product is used by other agencies
- 3 Consultancy**
 - Learn about operator policies (pay, leave, rostering, training, etc.)
 - Understand how agencies measure metrics or customer policies
- 4 Skip starting from scratch**
 - Obtain documents that can be adapted/reused (e.g., RFPs, plans)
 - Share code/technical detail
 - Learn how a program is set up
- 5 Current status/recent trends**
 - Find out what agencies are seeing or doing in real-time

Vehicle Collisions per 100,000 Vehicle Miles (Indexed to Group Average = 1)



Welcome to the ABBG

The staff at the TSC as well as the ABBG members and leadership welcome your questions and hope you will consider joining us, if you haven't already!



LaShawn Gillespie,
Deputy CEO of Foothill Transit,
ABBG President



Miguel Velazquez,
CEO of Rochester RTS,
ABBG Vice-President

Questions?



SunLine Transit Agency
CONSENT CALENDAR

DATE: December 4, 2024 **APPROVE**

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Checks \$1,000 and Over Report September 2024

Summary:

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

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

Vendor	Check #	Amount
<i>New Flyer of America Inc.</i>	697346	\$324,436.16
<i>New Flyer of America Inc.</i>	697339	\$324,436.16
<i>New Flyer of America Inc.</i>	697348	\$324,436.16
<i>New Flyer of America Inc.</i>	697343	\$269,806.43
<i>New Flyer of America Inc.</i>	697344	\$269,806.43
<i>New Flyer of America Inc.</i>	697342	\$269,806.43
<i>New Flyer of America Inc.</i>	697341	\$269,806.43
<i>New Flyer of America Inc.</i>	697349	\$269,806.43
<i>New Flyer of America Inc.</i>	697338	\$268,915.16
<i>New Flyer of America Inc.</i>	697347	\$268,915.16
<i>New Flyer of America Inc.</i>	697337	\$268,915.16
<i>New Flyer of America Inc.</i>	697340	\$268,915.16
<i>New Flyer of America Inc.</i>	697345	\$268,915.16

Recommendation:

Approve.

**SunLine Transit Agency
Checks \$1,000 and Over
September 2024**

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
CALPERS	Group Health Premiums	697361	09/25/2024	414,150.25
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697346	09/24/2024	324,436.16
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697339	09/24/2024	324,436.16
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697348	09/24/2024	324,436.16
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697343	09/24/2024	269,806.43
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697344	09/24/2024	269,806.43
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697342	09/24/2024	269,806.43
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697341	09/24/2024	269,806.43
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697349	09/24/2024	269,806.43
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697338	09/24/2024	268,915.16
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697347	09/24/2024	268,915.16
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697337	09/24/2024	268,915.16
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697340	09/24/2024	268,915.16
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697345	09/24/2024	268,915.16
U.S. BANK INSTITUTIONAL TRUST-WESTERN	Pension Deposit	697328	09/18/2024	83,616.12
U.S. BANK INSTITUTIONAL TRUST-WESTERN	Pension Deposit	697195	09/05/2024	82,181.93
SO CAL GAS CO.	Utilities	697246	09/11/2024	72,875.26
IMPERIAL IRRIGATION DIST	Utilities	697287	09/18/2024	60,998.07
ANEW RNG, LLC	Utilities	697354	09/25/2024	53,328.77
SHUTTLE BUS LEASING	Vehicle/Bus Leasing	697244	09/11/2024	49,600.00
MUTUAL OF OMAHA INSURANCE COMPANY	Supplement Benefits LTD/STD/LIFE Ins Prem	697389	09/25/2024	45,987.38
ATKINSON, ANDELSON, LOYA RUUD AND ROMO	Legal Service	697158	09/05/2024	38,002.50
VICTORIOUS GOLD PARTNERS, LLC.	Consulting	697199	09/05/2024	35,805.44
MICHELIN NORTH AMERICA, INC.	Lease Tires Services	697227	09/11/2024	31,790.98
ATKINSON, ANDELSON, LOYA RUUD AND ROMO	Legal Service	697157	09/05/2024	29,373.00
LUMINATOR TECHNOLOGY GROUP	Computer/Network Software Agreement	697226	09/11/2024	28,283.00
NAPA AUTO PARTS	Inventory Repair Parts	697390	09/25/2024	21,215.29
YELLOW CAB OF THE DESERT	SunRide Ride Share Expenses	697335	09/18/2024	18,553.53
YELLOW CAB OF THE DESERT	SunRide Ride Share Expenses	697256	09/11/2024	18,358.97
INSIGHT STRATEGIES INC	Consulting	697173	09/05/2024	17,550.00
VECTOR SOLUTIONS	Annual Membership Renewal	697239	09/11/2024	17,347.35
JE STRATEGIES LLC	Consulting	697293	09/18/2024	15,700.70
BALLARD POWER SYSTEMS	Inventory Repair Parts	697359	09/25/2024	15,004.27
A AND A FLEET PAINTING INC	WIP-Bus Rehabilitation Painting and Decals-Project Acct#2415	697202	09/11/2024	13,764.22
NFI PARTS	Inventory Repair Parts	697203	09/11/2024	13,091.98
VERIZON WIRELESS	Wireless Telephone Service	697253	09/11/2024	12,926.84
TRUGUARD SECURITY SERVICES, INC	Security Guard Services	697250	09/11/2024	12,237.90
NEL HYDROGEN INC.	Repair Parts-Hydrogen	697394	09/25/2024	12,048.00
VICTORIOUS GOLD PARTNERS, LLC.	Consulting	697415	09/25/2024	12,000.00

**SunLine Transit Agency
Checks \$1,000 and Over
September 2024**

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
JACKSON LEWIS P.C.	Insurance Loss	697290	09/18/2024	10,788.38
TRC ENGINEERING SERVICES, LLC	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	697249	09/11/2024	10,656.00
DYNAMIC BUILDING MAINTENANCE INC	Janitorial Services	697219	09/11/2024	9,519.00
DOVE PRINTING	Printing Expense	697294	09/18/2024	9,473.65
GENFARE, LLC	Inventory Repair Parts	697170	09/05/2024	9,172.49
DAHL, TAYLOR AND ASSOCIATES, INC.	WIP-Liquid Hydrogen Refueling- Project Acct#2211-02	697369	09/25/2024	8,423.54
WALTERS WHOLESALE ELECTRIC CO.	WIP-Facility Maintenance Upgrade- Project Acct#2413-11	697200	09/05/2024	7,310.84
SO CAL GAS CO.	Utilities	697319	09/18/2024	7,129.50
MODEL1 COMMERCIAL VEHICLES, INC.	Inventory Repair Parts	697215	09/11/2024	6,927.95
GARON WYATT INVESTIGATIVE SERVICES, LLC.	Insurance Loss	697380	09/25/2024	6,655.32
AMALGAMATED TRANSIT UNION	Union Dues	697261	09/18/2024	6,473.16
ROMAINE ELECTRIC CORP.	Inventory Repair Parts	697402	09/25/2024	6,421.90
A-1 ALTERNATIVE FUEL SYSTEMS/A-1 AUTO	Inventory Repair Parts	697155	09/05/2024	6,329.38
SONSRAY FLEET SERVICES	Inventory Repair Parts	697412	09/25/2024	6,276.22
1000BULBS.COM	WIP-Facility Maintenance Upgrade- Project Acct#2502-01	697258	09/18/2024	6,166.75
PREMIER TRANSMISSION	Repair Parts-Fixed Route	697238	09/11/2024	6,045.33
DANIELS TIRE SERVICE - GOOD YEAR	Inventory Repair Parts	697277	09/18/2024	5,768.71
GENFARE, LLC	Inventory Repair Parts	697284	09/18/2024	5,367.35
JOSEPH LYNN FRIEND	Contracted Services	697292	09/18/2024	5,280.00
US BANK VOYAGER FLEET SYSTEMS	Unleaded/Diesel Fuel	697330	09/18/2024	5,211.82
CMD CORPORATION	Repair Parts-CNG	697275	09/18/2024	5,037.33
ROBERT HALF	Temporary Help	697401	09/25/2024	4,883.46
ANDREA CARTER & ASSOCIATES	Marketing & Communication Services	697263	09/18/2024	4,880.00
OPW FUELING COMPONENTS	Inventory Repair Parts-SunFuels	697396	09/25/2024	4,867.02
RIDECO US INC	SunRide Ride Share Expenses	697240	09/11/2024	4,863.05
NFI PARTS	Inventory Repair Parts	697151	09/05/2024	4,789.68
TPX COMMUNICATIONS	Communication Service	697327	09/18/2024	4,748.28
ROMAINE ELECTRIC CORP.	Inventory Repair Parts	697188	09/05/2024	4,741.00
THE LEFLORE GROUP LLC	WIP-Liquid Hydrogen Refueling- Project Acct#2211-02	697403	09/25/2024	4,601.54
PETE'S AUTOMOTIVE SERVICES, INC.	Paratransit Repair Parts	697236	09/11/2024	4,257.40
SC FUELS	Lubricants- Oil	697243	09/11/2024	4,162.62
PARTY TIME RENTALS	Rentals Expenses	697296	09/18/2024	4,000.00
JESSE FRESCAS JR.	WIP- Coachella Transit Hub- Project Acct#2212-00	697384	09/25/2024	3,920.00
CMD CORPORATION	Inventory Repair Parts-SunFuels	697211	09/11/2024	3,845.74
GARON WYATT INVESTIGATIVE SERVICES, LLC.	Insurance Loss	697169	09/05/2024	3,821.75
SAFETY-KLEEN CORPORATION	Contract Svc-Haz Waste Removal	697313	09/18/2024	3,804.68
FPS SPECIALISTS IN FIRE SYSTEMS	Contract Services	697174	09/05/2024	3,650.00
ROBERT HALF	Temporary Help	697187	09/05/2024	3,444.20
GENFARE, LLC	Inventory Repair Parts	697223	09/11/2024	3,421.52

**SunLine Transit Agency
Checks \$1,000 and Over
September 2024**

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
PETE'S AUTOMOTIVE SERVICES, INC.	Paratransit Repair Parts	697305	09/18/2024	3,389.20
ROBERT HALF	Temporary Help	697309	09/18/2024	3,269.95
FORENSIC DRUG TESTING SERVICES	Alcohol & Drug Testing	697282	09/18/2024	3,261.60
CPAC INC.COM	Computer/Network Software Agreement	697214	09/11/2024	3,214.80
PALM SPRINGS MOTORS, INC.	Inventory Repair Parts	697233	09/11/2024	3,204.95
FORSITE	WIP- Coachella Transit Hub- Project Acct#2212-01	697248	09/11/2024	3,150.15
AMAZON CAPITAL SERVICES, INC	Shop Supplies	697352	09/25/2024	3,078.95
CMD CORPORATION	Inventory Repair Parts-SunFuels	697366	09/25/2024	3,072.02
CALIFORNIA STATE DISBURSEMENT UNIT	Garnishment	697160	09/05/2024	3,069.16
FRANKLIN TRUCK PARTS, INC	Inventory Repair Parts	697377	09/25/2024	2,986.00
CALIFORNIA STATE DISBURSEMENT UNIT	Garnishment	697272	09/18/2024	2,959.95
GILLIG LLC	Inventory Repair Parts	697224	09/11/2024	2,881.34
CHARTER COMMUNICATIONS	Utilities	697321	09/18/2024	2,855.00
YELLOW CAB OF THE DESERT	Taxi Voucher Program	697418	09/25/2024	2,749.45
PRUDENTIAL OVERALL SUPPLY	Uniforms	697185	09/05/2024	2,504.77
VALLEY OFFICE EQUIPMENT, INC.	Copier Service	697252	09/11/2024	2,433.65
WELTYS ENTERPRISES, INC.	Printing Expense	697332	09/18/2024	2,416.89
ENTECH OIL INC	Lubricants- Oil	697220	09/11/2024	2,392.05
AMAZON CAPITAL SERVICES, INC	Computer Supplies	697262	09/18/2024	2,386.10
MOHAWK MFG & SUPPLY CO	Inventory Repair Parts	697298	09/18/2024	2,359.67
SONSRAY FLEET SERVICES	Repair Parts-Fixed Route	697324	09/18/2024	2,345.95
TOKEN TRANSIT, INC	Mobile Ticketing Commission	697325	09/18/2024	2,306.72
IMPERIAL IRRIGATION DIST	Utilities	697171	09/05/2024	2,276.82
VALLEY OFFICE EQUIPMENT, INC.	Copier Service	697198	09/05/2024	2,254.83
ANDERSON COMMUNICATIONS	Radio Repeater Hill Top Rental	697358	09/25/2024	2,205.02
ANDERSON COMMUNICATIONS	Radio Repeater Hill Top Rental	697265	09/18/2024	2,205.02
PLAZA TOWING, INC.	Towing Services	697237	09/11/2024	2,125.00
LUMINATOR TECHNOLOGY GROUP	Inventory Repair Parts	697386	09/25/2024	2,101.14
HOME DEPOT CREDIT SERVICES	Facility Maintenance	697382	09/25/2024	2,023.86
FULTON DISTRIBUTING	Shop Supplies	697373	09/25/2024	2,002.08
JESSUP AUTO PLAZA	Inventory Repair Parts	697306	09/18/2024	1,859.76
OMNITRACS, LLC	General Services	697181	09/05/2024	1,820.00
BURRTEC WASTE & RECYCLING SERVICES	Trash Service	697208	09/11/2024	1,805.92
C V WATER DISTRICT	Utilities	697367	09/25/2024	1,777.59
BURRTEC WASTE & RECYCLING SERVICES	Trash Service	697209	09/11/2024	1,776.75
GALLAGHER BENEFIT SERVICES, INC	Consulting-General	697378	09/25/2024	1,750.00
RUSH TRUCK CENTERS OF CALIFORNIA, INC.	Inventory Repair Parts	697242	09/11/2024	1,717.50
BEST BUY BUSINESS ADVANTAGE ACCOUNT	WIP- Coachella Transit Hub- Project Acct#2212-03	697229	09/11/2024	1,620.51
AMAZON CAPITAL SERVICES, INC	Inventory Repair Parts	697205	09/11/2024	1,615.78

**SunLine Transit Agency
Checks \$1,000 and Over
September 2024**

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
BROADLUX, INC.	Contract Services-General	697360	09/25/2024	1,576.00
GALLAGHER BENEFIT SERVICES, INC	Consulting-General	697167	09/05/2024	1,575.00
PLAZA TOWING, INC.	Towing Services	697399	09/25/2024	1,525.00
FRONTIER COMMUNICATIONS	Utilities- OPS Bldg	697283	09/18/2024	1,525.00
PLAZA TOWING, INC.	Towing Services	697184	09/05/2024	1,525.00
NFI PARTS	Inventory Repair Parts	697351	09/25/2024	1,488.38
ROBERT HALF	Temporary Help	697241	09/11/2024	1,476.00
MILE3 WEB DEVELOPMENT	Website Maintenance	697228	09/11/2024	1,470.00
CARQUEST AUTO PARTS STORES	Inventory Repair Parts	697362	09/25/2024	1,462.17
TOTAL CARE WORK INJURY CLINIC	Medical Exam & Testing	697334	09/18/2024	1,460.00
DESERT AIR CONDITIONING, INC.	A/C Expense	697218	09/11/2024	1,376.00
SHAWN CRAYCRAFT	Reimbursement Expense	697317	09/18/2024	1,363.91
TEC EQUIPMENT, INC.	Inventory Repair Parts	697410	09/25/2024	1,347.88
DESERT AIR CONDITIONING, INC.	A/C Expense	697371	09/25/2024	1,344.00
PARKHOUSE TIRE, INC.	Repair Parts-Support Vehicle	697183	09/05/2024	1,335.55
SIGN A RAMA	WIP-LQ Hydrogen Refueling Infrastructure-Project Acct#2214	697407	09/25/2024	1,328.24
ON THE FLY TERMITE AND PEST CONTROL	Pest Control Services	697231	09/11/2024	1,192.00
GRAINGER	Inventory Repair Parts	697381	09/25/2024	1,185.73
GANNETT CALIFORNIA LOCALIQ	Public Notice	697168	09/05/2024	1,184.28
RIVERSIDE COUNTY SHERIFF'S OFFICE	Garnishment	697308	09/18/2024	1,165.26
PALM SPRINGS MOTORS, INC.	Inventory Repair Parts	697182	09/05/2024	1,124.43
RIVERSIDE COUNTY SHERIFF'S OFFICE	Garnishment	697186	09/05/2024	1,104.12
TEAMSTERS LOCAL 1932	Union Dues	697323	09/18/2024	1,099.89
CITY CAB	Taxi Voucher Program	697315	09/18/2024	1,089.75
MIKE STANGE	Consulting	697387	09/25/2024	1,050.00
LIFECOM, INC.	Contracted Services-General	697295	09/18/2024	1,050.00
PIEDMONT PLASTICS, INC.	Bus Stop Supplies	697398	09/25/2024	1,046.07
ABSOLUTE SELF STORAGE	Storage Rental	697350	09/25/2024	1,023.00
DECALS BY DESIGN, INC.	Inventory Repair Parts	697370	09/25/2024	1,011.27
SALVADOR VILLEGAS MARTINEZ	Reimbursement Expense	697314	09/18/2024	1,000.00
CESAR ACEVEDO	Reimbursement Expense	697274	09/18/2024	1,000.00
ROBERTO VALADEZ	Reimbursement Expense	697310	09/18/2024	1,000.00
MARIO LUNA	Reimbursement Expense	697297	09/18/2024	1,000.00
STEVE KELSO	Reimbursement Expense	697322	09/18/2024	1,000.00
CARLOS SOSA	Reimbursement Expense	697273	09/18/2024	1,000.00
Total Checks Over \$1,000	\$5,258,574.57			
Total Checks Under \$1,000	\$35,694.93			
Total Checks	\$5,294,269.50			

SunLine Transit Agency

CONSENT CALENDAR

DATE: December 4, 2024 **APPROVE**

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Credit Card Statement for September 2024

Summary:

The attached report summarizes the Agency's credit card expenses for September 2024. The report summarizes transactions for the credit cards utilized for Procurement and the CEO/General Manager which align with the statement closing date of September 30, 2024.

Recommendation:

Approve.



Reporting Period : 8/31/2024 - 9/30/2024

Statement Summary

Name	Ray Stevens	Company	Sunline Transit Agency
Account #	XXXX-XXXX-XXXX-████	Currency	US Dollar
Reporting Period	8/31/2024 - 9/30/2024		

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
1 8/29/2024	9/2/2024	Apta 202-4964800, DC					1,275.00
		Purchase Apta	General Ledger Code: 5090100000				
<hr/>							
2 9/3/2024	9/5/2024	United United.Com, TX					40.99
		Purchase United	General Ledger Code: 5090200000				
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3 9/3/2024	9/5/2024	United United.Com, TX					666.74
		Purchase United	General Ledger Code: 5090200000				
<hr/>							
4 9/3/2024	9/5/2024	United United.Com, TX					26.99
		Purchase United	General Ledger Code: 5090200000				
<hr/>							
5 9/3/2024	9/5/2024	United United.Com, TX					34.99
		Purchase United	General Ledger Code: 5090200000				
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Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
6 9/3/2024	9/5/2024	United United.Com, TX					40.99
		Purchase United	General Ledger Code: 5090200000				
<hr/>							
7 9/3/2024	9/5/2024	United United.Com, TX					26.99
		Purchase United	General Ledger Code: 5090200000				
<hr/>							
8 9/3/2024	9/5/2024	United United.Com, TX					26.99
		Purchase United	General Ledger Code: 5090200000				
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9 9/3/2024	9/5/2024	United United.Com, TX					666.74
		Purchase United	General Ledger Code: 5090200000				
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10 9/3/2024	9/5/2024	United United.Com, TX					34.99
		Purchase United	General Ledger Code: 5090200000				
<hr/>							
11 9/3/2024	9/5/2024	United United.Com, TX					26.99
		Purchase United	General Ledger Code: 5090200000				
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Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
12 9/4/2024	9/5/2024	Hilton Anaheim Certifi 214-7481200, CA					892.64
		Purchase Hilton Anaheim Certifi	General Ledger Code: 5039903800				
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13 9/4/2024	9/6/2024	Hilton Baltimore 443-5738704, MD					269.08
		Purchase Hilton Baltimore	General Ledger Code: 5090200000				
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14 9/4/2024	9/6/2024	Hilton Baltimore 443-5738704, MD					269.08
		Purchase Hilton Baltimore	General Ledger Code: 5090200000				
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15 9/6/2024	9/9/2024	Co Of Riverside Transport 951-9551800, CA					1,056.00
		Purchase Co Of Riverside Transport	General Ledger Code: 5099900002				
<hr/>							
16 9/7/2024	9/9/2024	Co Riverside Transportati 951-9550533, IN					24.08
		Purchase Co Riverside Transportati	General Ledger Code: 5099900002				
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17 9/9/2024	9/10/2024	Sams Club#6609 Palm Desert, CA					67.86
		Purchase Sams Club#6609	General Ledger Code: 5099900002				
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Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
18 9/9/2024	9/10/2024	Expedia 72916134756842 Expedia.Com, WA					1,220.31
		Purchase Expedia 72916134756842	General Ledger Code: 5090200000				
<hr/>							
19 9/9/2024	9/10/2024	Samsclub #6609 Palm Desert, CA					117.15
		Purchase Samsclub #6609	General Ledger Code: 5099900002				
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20 9/9/2024	9/10/2024	Itlc.* Making Connecti Httpswww.Tran, MD					730.00
		Purchase Itlc.* Making Connecti	General Ledger Code: 5090200000				
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21 9/9/2024	9/11/2024	United United.Com, TX					69.99
		Purchase United	General Ledger Code: 5090200000				
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22 9/9/2024	9/11/2024	United United.Com, TX					237.98
		Purchase United	General Ledger Code: 5090200000				
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23 9/9/2024	9/11/2024	Apta 202-4964800, DC					1,275.00
		Purchase Apta	General Ledger Code: 5090100000				
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Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
24 9/9/2024	9/11/2024	United United.Com, TX					109.99
		Purchase United	General Ledger Code: 5090200000				
<hr/>							
25 9/9/2024	9/11/2024	United United.Com, TX					460.15
		Purchase United	General Ledger Code: 5090200000				
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26 9/9/2024	9/11/2024	City Of Coachella Util 760-3983202, CA					235.00
		Purchase City Of Coachella Util	General Ledger Code: 5099900002				
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27 9/14/2024	9/16/2024	Hilton Baltimore 443-5738704, MD					269.08
		Purchase Hilton Baltimore	General Ledger Code: 5090200000				
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28 9/16/2024	9/17/2024	Ctc-Vis 279-842-9957, CA					360.00
		Purchase Ctc-Vis	General Ledger Code: 5099900002				
<hr/>							
29 9/16/2024	9/17/2024	Ctc-Vis *svc 279-842-9957, MD					10.76
		Purchase Ctc-Vis *svc	General Ledger Code: 5099900002				
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Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
30 9/17/2024	9/18/2024	Perb Arb Full List 916-3272275, CA					50.00
		Purchase Perb Arb Full List	General Ledger Code: 5099900002				
<hr/>							
31 9/17/2024	9/18/2024	Elavon Srv Fee Arbitratio 678-7315974, GA					1.15
		Purchase Elavon Srv Fee Arbitratio	General Ledger Code: 5099900002				
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32 9/19/2024	9/20/2024	Sams Club #6609 Palm Desert, CA					287.04
		Purchase Sams Club #6609	General Ledger Code: 5099900002				
<hr/>							
33 9/20/2024	9/23/2024	Apta 202-4964800, DC					1,275.00
		Purchase Apta	General Ledger Code: 5090100000				
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34 9/24/2024	9/25/2024	Fatboy Tacos & Catering Clover.Com, CA					100.00
		Purchase Fatboy Tacos & Catering	General Ledger Code: 5099900002				
<hr/>							
35 9/24/2024	9/25/2024	Live Chat 617-275-2400, MA					614.01
		Purchase Live Chat	General Ledger Code: 5030300011				
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Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
36 9/24/2024	9/25/2024	Sp Incredible Cookies Httpsincredib, NJ					675.74
Purchase Sp Incredible Cookies		General Ledger Code: 5099900002		_____	_____	_____	

Transaction Count: 36
Total: 13,545.49

Employee Signature Date

Authorized Approver Signature Date

SunLine Transit Agency Visa Credit Card Statement

Closing Date: 9/30/2024

Name on Card: Ray Stevens (Procurement Card)

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
1	08/29/24	9/2/2024	APTA	Approved Travel for Tamara Miles - Lodging Charge Transit Workforce Center Conference		\$ 1,275.00
2	09/03/24	9/5/2024	UNITED	Approved Travel for Bryan Valenzuela - Seat Charge Transit Workforce Center Conference		\$ 40.99
3	09/03/24	9/5/2024	UNITED	Approved Travel for Bryan Valenzuela - Flight Charge Transit Workforce Center Conference		\$ 666.74
4	09/03/24	9/5/2024	UNITED	Approved Travel for Bryan Valenzuela - Seat Charge Transit Workforce Center Conference		\$ 26.99
5	09/03/24	9/5/2024	UNITED	Approved Travel for Magali Jimenez - Seat Charge Transit Workforce Center Conference		\$ 34.99
6	09/03/24	9/5/2024	UNITED	Approved Travel for Bryan Valenzuela - Seat Charge Transit Workforce Center Conference		\$ 40.99
7	09/03/24	9/5/2024	UNITED	Approved Travel for Bryan Valenzuela - Seat Charge Transit Workforce Center Conference		\$ 26.99
8	09/03/24	9/5/2024	UNITED	Approved Travel for Magali Jimenez - Seat Charge Transit Workforce Center Conference		\$ 26.99
9	09/03/24	9/5/2024	UNITED	Approved Travel for Magali Jimenez - Flight Charge Transit Workforce Center Conference		\$ 666.74
10	09/03/24	9/5/2024	UNITED	Approved Travel for Magali Jimenez - Seat Charge Transit Workforce Center Conference		\$ 34.99
11	09/03/24	9/5/2024	UNITED	Approved Travel for Magali Jimenez - Seat Charge Transit Workforce Center Conference		\$ 26.99
12	09/04/24	9/5/2024	Hilton Anaheim	Approved Travel for Tamara Miles - Lodging Charge APTA TRANSform Conference		\$ 892.64
13	09/04/24	9/6/2024	Hilton Anaheim	Approved Travel for Bryan Valenzuela - Lodging Charge APTA TRANSform Conference		\$ 269.08
14	09/04/24	9/6/2024	Hilton Biltmore	Approved Travel for Magali Jimenez - Lodging Charge APTA TRANSform Conference		\$ 269.08
15	09/06/24	9/9/2024	Co of Riverside Transport	Commercial Building Deposit for Fire Marshall		\$ 1,056.00
16	09/06/24	9/9/2024	Co of Riverside Transport	Commercial Building Deposit for Fire Marshall - Service Fee		\$ 24.08
17	09/09/24	9/10/2024	Sam's Club	Water and Coffee for Benefits Event		\$ 67.86
18	09/09/24	9/10/2024	Expedia	Approved Travel for Marina Blackstone - Lodging Charge APTA TRANSform Conference		\$ 1,220.31
19	09/09/24	9/10/2024	Sam's Club	Board Room Supplies		\$ 117.15

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
20	09/09/24	9/10/2024	Itlc Making Connections	Approved Travel for Isabel Vizcarra - Registration Fees The National Transit Workforce Conference		\$ 730.00
21	09/09/24	9/11/2024	UNITED	Approved Travel for Isabel Vizcarra - Seat Charge The National Transit Workforce Conference		\$ 69.99
22	09/09/24	9/11/2024	UNITED	Approved Travel for Isabel Vizcarra - Transportation Tax Charge The National Transit Workforce Conference		\$ 237.98
23	09/09/24	9/11/2024	APTA	Approved Travel for Marina Blackstone - Registration Fee APTA TRANSform Conference		\$ 1,275.00
24	09/09/24	9/11/2024	UNITED	Approved Travel for Isabel Vizcarra - Seat Charge The National Transit Workforce Conference		\$ 109.99
25	09/09/24	9/11/2024	UNITED	Approved Travel for Isabel Vizcarra - Flight Charge The National Transit Workforce Conference		\$ 460.15
26	09/09/24	9/11/2024	City of Coachella	Water and Sweeper Deposit Fees		\$ 235.00
27	09/14/24	9/16/2024	Hilton Baltimore	Approved Travel for Isabel Vizcarra - Lodging Charge The National Transit Workforce Conference		\$ 269.08
28	09/16/24	9/17/2024	Ctc - Vis	CARB Clean Truck Reporting Fees		\$ 360.00
29	09/16/24	9/17/2024	Ctc - Vis	CARB Clean Truck Reporting Fees		\$ 10.76
30	09/17/24	9/18/2024	Perb Arb Full List	PERB Arbitration Fee		\$ 50.00
31	09/17/24	9/18/2024	Elavon Srv Fee Arbitration	PERB Arbitration Service Fee		\$ 1.15
32	09/19/24	9/20/2024	Sam's Club	Coachella HUB Water Pallet		\$ 287.04
33	09/20/24	9/23/2024	APTA	Mona's Registration Fee - APTA TRANSform Conference		\$ 1,275.00
34	09/24/24	9/25/2024	Fatboy Tacos & Catering	Catering Deposit Fee for Coachella Hub Ribbon Cutting		\$ 100.00
35	09/24/24	9/25/2024	Live Chat	Yearly Subscription Fee for Online Chat Function for SunLine Website		\$ 614.01
36	09/02/24	9/25/2024	Incredible Cookies	Cookies for Liquid Hydrogen Station Ribbon Cutting		\$ 675.74
Totals:					\$ -	\$ 13,545.49



Reporting Period : 8/31/2024 - 9/30/2024

Statement Summary

Name	Walter Watcher	Company	Sunline Transit Agency
Account #	XXXX-XXXX-XXXX-████	Currency	US Dollar
Reporting Period	8/31/2024 - 9/30/2024		

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
1 8/30/2024	9/2/2024	Expedia 72908248059806 Expedia.Com, WA					831.27
		Purchase Expedia 72908248059806	General Ledger Code: 5090200000 Fund: 00				
Approve Travel for Isabel Vizcarra - Lodging Charge - APTA TRANSform Conference				Operations Department			
<hr/>							
2 8/30/2024	9/2/2024	Expedia 72908378744007 Expedia.Com, WA					608.85
		Purchase Expedia 72908378744007	General Ledger Code: 5090200000 Fund: 00				
Approved Travel for Mark Perry - Lodging Charge - ZEBRA Conference				Maintenance Department			
<hr/>							
3 8/30/2024	9/9/2024	Palms Place Residentia Las Vegas, NV					157.60
		Purchase Palms Place Residentia	General Ledger Code: 5090200000 Fund: 00				
Approved Travel for Shawn CrayCraft - Lodging Charge - ZEBRA Conference				SunFuels Department			
<hr/>							
4 9/4/2024	9/5/2024	Itlc.* Making Connecti Httpswww.Tran, MD					650.00
		Purchase Itlc.* Making Connecti	General Ledger Code: 5090200000 Fund: 00				
Approved Travel for Bryan Valenzuela - Conference Charge - Transit Workforce Center Conference				Safety Department			
<hr/>							

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
5 9/4/2024	9/5/2024	Itlc.* Making Connecti Httpswww.Tran, MD					575.00
Purchase Itlc.* Making Connecti			General Ledger Code: 5090200000 Fund: 00				
Approved Travel for Magali Jimenez - Conference Charge - Transit Workforce Center Conference				HR Department			
6 9/4/2024	9/5/2024	Expedia 72908378744007 Expedia.Com, WA					-182.80
Credit Voucher Expedia 72908378744007			General Ledger Code: 5090200000 Fund: 00				
Approved Travel for Mark Perry - Hotel Credit for 1 Night - ZEBRA Conference				Maintenance Department			
7 9/4/2024	9/5/2024	Haws Co Httpshawscopa, NV					318.94
Purchase Haws Co			General Ledger Code: 5099900002 Fund: 00				
PR 21802 - Cane Detector - Coachella Hub				Performance Department			
8 9/4/2024	9/6/2024	Plattsburgh Spring, In 518-8884962, NY					293.43
Purchase Plattsburgh Spring, In			General Ledger Code: 5049900022 Fund: 00				
PR 21803 - 4 U Bolts 5'8 x 14in Long - 4in Wide				Maintenance Department			
9 9/4/2024	9/9/2024	Apta 202-4964800, DC					1,275.00
Purchase Apta			General Ledger Code: 5090100000 Fund: 00				
Approved Travel for Marina Blackstone - Conference Charge - APTA TRANSform Conference				Operation Department			
10 9/5/2024	9/6/2024	Fuel Cell Earth 617-532-0582, MA					807.68
Purchase Fuel Cell Earth			General Ledger Code: 5039903800 Fund: 00				
PR 21792 - CALSTART HS Outreach - Fuel Cell Cars				Performance Department			

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
11 9/12/2024	9/13/2024	Air Compressor Svcs Httpsaircompr, SC					118.62
		Purchase Air Compressor Svcs	General Ledger Code: 5099900002 Fund: 00				
		PR 21835 - Air Compressor Service Filters				SunFuels Department	
12 9/15/2024	9/17/2024	Hyatt Regency Portland 9712221234, OR					844.48
		Purchase Hyatt Regency Portland	General Ledger Code: 5090200000 Fund: 00				
		Approved Travel for Edit Hernandez - Lodging Charge - Latinos in Transit Leadership Academy Summit 2024				Executive Department	
13 9/15/2024	9/17/2024	Hyatt Regency Portland 9712221234, OR					685.59
		Purchase Hyatt Regency Portland	General Ledger Code: 5090200000 Fund: 00				
		Approved Travel for Dioselyn Ayala Moreno - Lodging Charge - Latinos in Transit Leadership Academy Summit 2024				Planning Department	
14 9/15/2024	9/17/2024	Hyatt Regency Portland 9712221234, OR					914.12
		Purchase Hyatt Regency Portland	General Ledger Code: 5090200000 Fund: 00				
		Approved Travel for Jessica Leon - Lodging Charge - Latinos in Transit Leadership Academy Summit 2024				Planning Department	
15 9/19/2024	9/20/2024	Kimpton Monaco Pittsburg 4124711170, PA					1,044.24
		Purchase Kimpton Monaco Pittsburg	General Ledger Code: 5090200000 Fund: 00				
		Approve Travel for Isaac Rodriguez - Lodging Charge - Connect 2024 - Clever Devices Conference				Planning Department	
16 9/25/2024	9/27/2024	Trimble Inc 937-2455500, CO					200.79
		Purchase Trimble Inc	General Ledger Code: 5030300011 Fund: 00				
		PR 21912 - Sketch Up - Additional User License for Patricia Anna Dan				Planning Department	

Transaction Count: 16

Total: 9,142.81

Employee Signature

Date

Authorized Approver Signature

Date

SunLine Transit Agency Visa Credit Card Statement

Closing Date: 9/30/2024

Name on Card: Walter Watcher (Procurement Card)

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
1	08/30/24	9/2/2024	Expedia	Approved Travel for Isabel Vizcarra - Lodging Charge APTA TRANSform Conference		\$ 831.27
2	08/30/24	9/2/2024	Expedia	Approved Travel for Mark Perry - Lodging Charge ZEBRA Conference		\$ 608.85
3	08/30/24	9/5/2024	Palms Place	Approved Travel for Shawn Craycraft - Lodging Charge ZEBRA Conference		\$ 157.60
4	09/04/24	9/5/2024	Itlc Making Connections	Approved Travel for Bryan Valenzuela - Conference Charge Transit Workforce Center Conference		\$ 650.00
5	09/04/24	9/5/2024	Itlc Making Connections	Approved Travel for Magali Jimenez - Conference Charge Transit Workforce Center Conference		\$ 575.00
6	09/04/24	9/5/2024	Expedia	Approved Travel for Mark Perry - Lodging CREDIT ZEBRA Conference	\$ (182.80)	
7	09/04/24	9/5/2024	Haws Co.	Cane Detector for Coachella Hub		\$ 318.94
8	09/04/24	9/6/2024	Plattsburg Springs	Bolts for Deadlined Paratransit Vehicle		\$ 293.43
9	09/04/24	9/9/2024	APRA	Approved Travel for Mariana Blackstone - Lodging Charge APTA TRANSform Conference		\$ 1,275.00
10	09/05/24	9/6/2024	Fuel Cell Earth	Fuel Cell Car Science Kits (6) for Educational Purposes Related to Workforce Development Activities		\$ 807.68
11	09/12/24	9/13/2024	Air Compressor Services	Air Compressor Service Filters		\$ 118.62
12	09/15/24	9/17/2024	Hyatt Regency Portland	Approved Travel for Edith Hernandez - Lodging Charge Latinos in Transit Leadership Academy Summit 2021		\$ 844.48
13	09/15/24	9/17/2024	Hyatt Regency Portland	Approved Travel for Dioselyn Ayala Moreno - Lodging Charge Latinos in Transit Leadership Academy Summit 2021		\$ 685.59
14	09/15/24	9/17/2024	Hyatt Regency Portland	Approved Travel for Jessica Leon - Lodging Charge Latinos in Transit Leadership Academy Summit 2021		\$ 914.12
15	09/19/24	9/20/2024	Kimpton Monaco Pittsburg	Approved Travel for Isaac Rodriguez - Lodging Charge Connect 2024 - Clever Device Conference		\$ 1,044.24
16	09/25/24	9/27/2024	Trimble Inc.	Sketch Up - Additional User License		\$ 200.79
Totals:					\$ (182.80)	\$ 9,325.61

SunLine Transit Agency
CONSENT CALENDAR

DATE: December 4, 2024 **APPROVE**

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Monthly Budget Variance Report for September 2024

Summary:

The budget variance report compares revenues and expenses to the respective line item budgets. The report identifies current monthly revenues and expenses as well as fiscal year to date (FYTD) values. The budgetary figures are represented as a straight line budget. Accordingly, the current monthly budget values are calculated by taking 1/12th of the annual budget. The FYTD budget values for the month of September 2024 are equal to 3/12^{ths} of the yearly budget.

Year to Date Summary

- As September 30, 2024, the Agency's FYTD revenues are \$286,225 or 23.39% below the FYTD budget.
- As of September 30, 2024, the Agency's FYTD expenditures are \$773,834 or 6.26% below the FYTD budget.

Monthly Spotlight:

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

Recommendation:

Approve.

SunLine Transit Agency
Budget Variance Report
September 2024

Description	FY25 Budget	Total	Current Month			Fiscal Year to Date			
			Actual	Budget	Positive (Negative)	FYTD Actual	FY25 FYTD Budget	Positive (Negative)	Percentage Remaining
Operating Revenues:									
Passenger Revenue	1,816,893		122,435	151,408	(28,972)	398,352	454,223	(55,871)	78.1%
Other Revenue	3,078,163		166,392	256,514	(90,121)	539,187	769,541	(230,354)	82.5%
Total Operating Revenue	4,895,056		288,828	407,921	(119,094)	937,539	1,223,764	(286,225)	80.8%
Operating Expenses:									
Operator & Mechanic Salaries & Wages	11,239,225		865,234	936,602	71,368	2,673,526	2,809,806	136,280	76.2%
Operator & Mechanic Overtime	1,241,785		171,594	103,482	(68,111)	433,272	310,446	(122,826)	65.1%
Administration Salaries & Wages	7,861,873		590,266	655,156	64,890	1,848,948	1,965,468	116,520	76.5%
Administration Overtime	125,061		29,201	10,422	(18,779)	56,174	31,265	(24,909)	55.1%
Fringe Benefits	11,105,305		651,722	925,442	273,720	2,147,506	2,776,326	628,821	80.7%
Communications	287,782		24,092	23,982	(110)	68,473	71,946	3,472	76.2%
Legal Services	687,176		53,175	57,265	4,089	213,753	171,794	(41,959)	68.9%
Computer/Network Software Agreement	796,582		81,138	66,382	(14,756)	259,876	199,146	(60,730)	67.4%
Uniforms	99,824		2,392	8,319	5,927	8,746	24,956	16,210	91.2%
Contracted Services	1,556,640		66,716	129,720	63,004	172,206	389,160	216,954	88.9%
Equipment Repairs	26,500		3,992	2,208	(1,783)	10,187	6,625	(3,562)	61.6%
Security Services	168,000		13,775	14,000	225	38,476	42,000	3,524	77.1%
Fuel - CNG	1,920,006		138,377	160,001	21,623	454,324	480,002	25,677	76.3%
Fuel - Hydrogen	1,443,827		61,267	120,319	59,052	198,682	360,957	162,274	86.2%
Tires	234,000		29,338	19,500	(9,838)	66,411	58,500	(7,911)	71.6%
Office Supplies	81,260		4,894	6,772	1,878	13,676	20,315	6,639	83.2%
Travel/Training	248,200		25,102	20,683	(4,419)	52,189	62,050	9,861	79.0%
Repair Parts	2,008,500		223,950	167,375	(56,575)	466,791	502,125	35,334	76.8%
Facility Maintenance	87,000		7,586	7,250	(336)	6,720	21,750	15,030	92.3%
Electricity - CNG & Hydrogen	1,090,000		59,759	90,833	31,074	165,009	272,500	107,491	84.9%
Natural Gas	2,030,000		98,216	169,167	70,950	360,898	507,500	146,602	82.2%
Water and Gas	16,000		883	1,333	450	2,779	4,000	1,221	82.6%
Insurance Losses	1,235,000		419,436	102,917	(316,520)	590,719	308,750	(281,969)	52.2%
Insurance Premium - Property	200,000		19,055	16,667	(2,388)	57,165	50,000	(7,165)	71.4%
Repair Claims	100,000		0	8,333	8,333	0	25,000	25,000	100.0%
Fuel Taxes	124,500		3,748	10,375	6,627	21,768	31,125	9,357	82.5%
Other Expenses	7,465,578		547,011	622,132	75,120	1,787,229	1,866,395	79,165	76.1%
Self Consumed Fuel	(4,062,246)		(199,644)	(338,521)	(138,876)	(594,993)	(1,015,562)	(420,568)	85.4%
Total Operating Expenses (Before Depreciation)	49,417,378		3,992,275	4,118,115	125,840	11,580,510	12,354,345	773,834	76.6%
Operating Expenses in Excess of Operating Revenue			\$ (3,703,447)			\$ (10,642,971)			
Subsidies:									
Local	8,419,000		700,308	701,583	1,276	2,012,545	2,104,750	92,205	76.1%
State	30,588,336		2,544,393	2,549,028	4,635	7,312,080	7,647,084	335,004	76.1%
Federal	5,514,986		458,747	459,582	836	1,318,346	1,378,747	60,400	76.1%
Total Subsidies	44,522,322		3,703,447	3,710,194	6,746	10,642,971	11,130,581	487,610	76.1%
Net Operating Gain (Loss) After Subsidies	\$ (0)		\$ -			\$ -			

SunLine Transit Agency
Budget Variance Report
September 2024

Description	FY25 Total Budget	Current Month			Fiscal Year to Date			
		Actual	Budget	Positive (Negative)	FYTD Actual	FY25 FYTD Budget	Positive (Negative)	Percentage Remaining
Operating Expenses:								
Wages & Benefits	31,574,749	2,308,017	2,631,229	323,212	7,159,426	7,893,687	734,262	77.3%
Services	6,903,050	458,384	575,254	116,870	1,497,548	1,725,763	228,215	78.3%
Fuels & Lubricants	3,581,133	207,961	298,428	90,467	700,059	895,283	195,225	80.5%
Tires	234,000	29,338	19,500	(9,838)	66,411	58,500	(7,911)	71.6%
Materials and Supplies	2,607,460	272,215	217,288	(54,927)	584,315	651,865	67,550	77.6%
Utilities	3,554,000	193,105	296,167	103,062	633,264	888,500	255,236	82.2%
Casualty & Liability	3,678,540	601,841	306,545	(295,296)	1,200,352	919,635	(280,717)	67.4%
Taxes and Fees	124,500	3,748	10,375	6,627	21,768	31,125	9,357	82.5%
Miscellaneous Expenses	1,222,192	117,311	101,849	(15,461)	312,362	305,548	(6,814)	74.4%
Self Consumed Fuel	(4,062,246)	(199,644)	(338,521)	(138,876)	(594,993)	(1,015,562)	(420,568)	85.4%
Total Operating Expenses (Before Depreciation)	49,417,378	3,992,275	4,118,115	125,840	11,580,510	12,354,345	773,834	76.6%
Revenues:								
Passenger Revenue	1,816,893	122,435	151,408	(28,972)	398,352	454,223	(55,871)	78.1%
Other Revenue	3,078,163	166,392	256,514	(90,121)	539,187	769,541	(230,354)	82.5%
Total Operating Revenue	4,895,056	288,828	407,921	(119,094)	937,539	1,223,764	(286,225)	80.8%
Net Operating Gain (Loss)		\$ (3,703,447)			\$ (10,642,971)			
Subsidies:								
Local	8,419,000	700,308	701,583	1,276	2,012,545	2,104,750	92,205	76.1%
State	30,588,336	2,544,393	2,549,028	4,635	7,312,080	7,647,084	335,004	76.1%
Federal	5,514,986	458,747	459,582	836	1,318,346	1,378,747	60,400	76.1%
Total Subsidies	44,522,322	3,703,447	3,710,194	6,746	10,642,971	11,130,581	487,610	76.1%
Net Operating Gain (Loss) After Subsidies	\$ (0)	\$ -			\$ -			

Budget Variance Analysis - SunLine Transit Agency

Passenger Revenue

- The unfavorable variance in passenger revenue is due to lower summer ridership.
- As of September, ridership was at 8.3% above FY24 FYTD totals.
- Total system ridership was 51,135 trips above FY24 FYTD amounts.

Ridership

	FY24-September	FY25-September	Variance	%Δ
Fixed Route	205,433	226,936	21,503	10.5%
Paratransit	9,858	9,204	(654)	-6.6%
SunRide	1,682	2,154	472	28.1%
System Total	216,973	238,294	21,321	9.8%

Ridership

	FYTD-FY24	FYTD-FY25	Variance	%Δ
Fixed Route	580,884	631,483	50,599	8.7%
Paratransit	29,677	28,354	(1,323)	-4.5%
SunRide	4,381	6,240	1,859	42.4%
System Total	614,942	666,077	51,135	8.3%

Other Revenue

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

Operator & Mechanic Salaries & Wages

- Operator and mechanic wages are within an acceptable range of the budget.

Operator & Mechanic Overtime

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

Administration Salaries & Wages

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

Administration Overtime

- The unfavorable variance is primarily attributed to overtime in the Maintenance department to account for vacant positions.

Fringe Benefits

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

Communications

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

Legal Services

- Legal services are over budget due to an increase usage of legal services and increased costs for new firm.

Computer/Network Software Agreement

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

Uniforms

- Savings in uniform expenditures are related to fewer employees utilizing the entire uniform allowance.

Contracted Services

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

Equipment Repairs

- The unfavorable balance in equipment repair costs is primarily attributed to vehicle lift inspections in July.

Security Services

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

Fuel - CNG

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

Fuel - Hydrogen

- The savings in hydrogen fuel is primarily attributed to lower usage of hydrogen fixed route vehicles as the agency is not utilizing the full fleet.

Tires

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

Office Supplies

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

Travel/Training

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

Repair Parts

- The favorable variance is due to lower than usual repairs for the months of July & August.

Facility Maintenance

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

Electricity - CNG & Hydrogen

- Electricity - CNG & Hydrogen expenses are less than anticipated use in the first quarter of FY25.

Natural Gas

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

Water and Gas

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

Insurance Losses

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

Insurance Premium - Property

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

Repair Claims

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

Fuel Taxes

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

Other Expenses

- The favorable variance is primarily due to studies and services which are not scheduled to begin until the second half of FY25.

Self-Consumed Fuel

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

SunLine Transit Agency
CONSENT CALENDAR

DATE: December 4, 2024 **APPROVE**

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Contracts Signed between \$25,000 and \$250,000 for
September 2024

Summary:

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

There were three (3) agreements executed in September 2024 between \$25,000 and \$250,000:

Vendor	Purpose	Amount
Vasquez & Company	Pension Audit	\$118,071.00
Scelzi Enterprises	CNG Truck Upfit	\$56,354.65
JFK Foundation	Sponsorship	\$25,000.00

Recommendation:

Approve.

Contracts Signed Between \$25,000 and \$250,000
September 2024

Vendor	Product/Service	Need	Budgeted	Budgeted Amount	Cost	Type
Vasquez & Company	Audit Services Total 5 Years	Pension Audit	FY25 FY26 FY27 FY28 FY29	\$118,071.00	\$118,071.00	Agreement
Scelzi Enterprises	Truck Upfit	CNG Truck	FY25	\$88,540.00	\$56,354.65	Agreement
JFK Foundation	Sponsorship	Sponsorship	FY25	\$25,000.00	\$25,000.00	Agreement

SunLine Transit Agency
CONSENT CALENDAR

DATE: December 4, 2024 **APPROVE**

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Union & Non-Union Pension Investment Asset Summary
for September 2024

Summary:

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

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

For the month of September, 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	30.7%	16% – 56%
	International Equity	18.2%	0% - 39%
	Other	4.8%	0% – 20%
Income Assets			
	Fixed Income	38.5%	25% - 65%
	Other	4.6%	0% – 20%
Real Return Assets		0.0%	0% – 20%

Cash Equivalents	3.1%	0% – 20%
-------------------------	------	----------

Non-Union

Asset Class		Actual	Range
Growth Assets			
	Domestic Equity	30.4%	16% – 56%
	International Equity	18.1%	0% - 39%
	Other	4.8%	0% – 20%
Income Assets			
	Fixed Income	38.6%	25% - 65%
	Other	4.6%	0% – 20%
Real Return Assets		0.0%	0% – 20%
Cash Equivalents		3.4%	0% – 20%

Components may not sum to 100.0% due to rounding.

For the month of September, the market value of assets increased by \$724,001 and \$738,961 for the union and non-union plans, respectively.

Month to Month Asset Comparison

Month	Market Value - Union	Market Value – Non-Union
August 2024	\$43,315,763	\$43,346,089
September 2024	\$44,039,764	\$44,085,050
Increase (Decrease)	\$724,001	\$738,961

Recommendation:

Approve.

Portfolio Summary and Statistics

For the Month Ending **September 30, 2024**

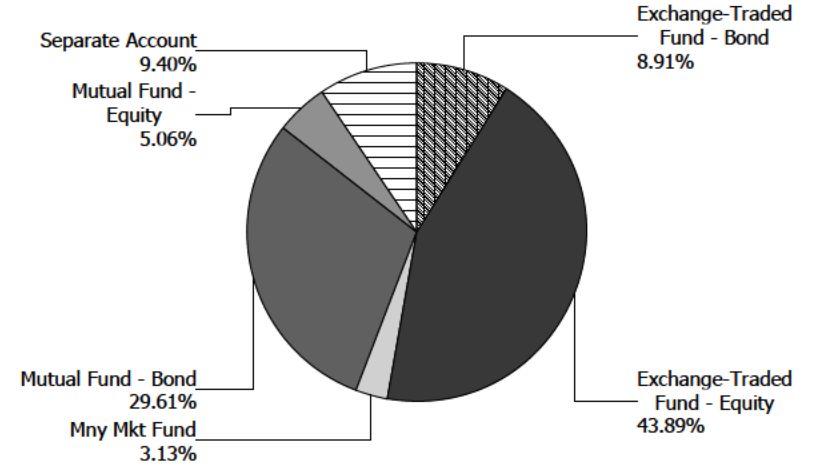
SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]

Account Summary

Description	Par Value	Market Value	Percent
Separate Account	3,300,722.36	4,139,389.05	9.40
Mutual Fund - Equity	94,242.86	2,227,448.14	5.06
Mutual Fund - Bond	1,307,819.34	13,041,403.38	29.61
Money Market Mutual Fund	1,378,248.66	1,378,248.66	3.13
Exchange-Traded Fund - Equity	140,721.00	19,328,314.12	43.89
Exchange-Traded Fund - Bond	45,630.00	3,924,960.75	8.91
Managed Account Sub-Total	6,267,384.22	44,039,764.10	100.00%
Accrued Interest		0.00	
Total Portfolio	6,267,384.22	44,039,764.10	

Unsettled Trades 0.00 0.00

Sector Allocation



Detail of Securities Held & Market Analytics

For the Month Ending **September 30, 2024**

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 5-10Y INV GRADE CORP	464288638	IGIB	1,146.00	61.12	70,043.52	53.72	61,563.12	(8,480.40)	0.14
ISHARES 5-10Y INV GRADE CORP	464288638	IGIB	2,389.00	60.30	144,056.70	53.72	128,337.08	(15,719.62)	0.29
ISHARES 5-10Y INV GRADE CORP	464288638	IGIB	631.00	56.68	35,765.08	53.72	33,897.32	(1,867.76)	0.08
ISHARES 5-10Y INV GRADE CORP	464288638	IGIB	1,776.00	57.66	102,405.94	53.72	95,406.72	(6,999.22)	0.22
ISHARES 5-10Y INV GRADE CORP	464288638	IGIB	965.00	61.00	58,865.00	53.72	51,839.80	(7,025.20)	0.12
ISHARES 5-10Y INV GRADE CORP	464288638	IGIB	633.00	56.98	36,068.34	53.72	34,004.76	(2,063.58)	0.08
ISHARES 5-10Y INV GRADE CORP	464288638	IGIB	7,097.00	50.32	357,121.04	53.72	381,250.84	24,129.80	0.87
ISHARES CORE U.S. AGGREGATE	464287226	AGG	6,446.00	92.76	597,930.32	101.27	652,786.42	54,856.10	1.48
ISHARES CORE U.S. AGGREGATE	464287226	AGG	3,322.00	99.12	329,276.64	101.27	336,418.94	7,142.30	0.76
ISHARES CORE U.S. AGGREGATE	464287226	AGG	17,918.00	98.64	1,767,431.52	101.27	1,814,555.86	47,124.34	4.12
ISHARES CORE U.S. AGGREGATE	464287226	AGG	3,307.00	96.40	318,794.80	101.27	334,899.89	16,105.09	0.76
Security Type Sub-Total			45,630.00		3,817,758.90	781.12	3,924,960.75	107,201.85	8.92
Exchange-Traded Fund - Equity									
VANGUARD FTSE DEVELOPED ETF	921943858	VEA	4,430.00	49.80	220,614.00	52.81	233,948.30	13,334.30	0.53
VANGUARD FTSE DEVELOPED ETF	921943858	VEA	2,614.00	37.16	97,136.24	52.81	138,045.34	40,909.10	0.31
VANGUARD FTSE DEVELOPED ETF	921943858	VEA	2,629.00	39.67	104,292.43	52.81	138,837.49	34,545.06	0.32
VANGUARD FTSE DEVELOPED ETF	921943858	VEA	2,193.00	42.17	92,478.81	52.81	115,812.33	23,333.52	0.26
VANGUARD FTSE DEVELOPED ETF	921943858	VEA	6,816.00	38.85	264,801.60	52.81	359,952.96	95,151.36	0.82
VANGUARD TOTAL INTL STOCK	921909768	VXUS	593.00	56.00	33,208.00	64.74	38,390.82	5,182.82	0.09
VANGUARD TOTAL INTL STOCK	921909768	VXUS	3,480.00	52.06	181,168.80	64.74	225,295.20	44,126.40	0.51
VANGUARD TOTAL INTL STOCK	921909768	VXUS	2,875.00	51.81	148,953.46	64.74	186,127.50	37,174.04	0.42
VANGUARD TOTAL INTL STOCK	921909768	VXUS	17,752.00	52.12	925,234.24	64.74	1,149,264.48	224,030.24	2.61
VANGUARD TOTAL INTL STOCK	921909768	VXUS	8,244.00	52.50	432,810.00	64.74	533,716.56	100,906.56	1.21
VANGUARD TOTAL INTL STOCK	921909768	VXUS	6,003.00	61.64	370,024.92	64.74	388,634.22	18,609.30	0.88
VANGUARD TOTAL INTL STOCK	921909768	VXUS	553.00	64.34	35,580.02	64.74	35,801.22	221.20	0.08
VANGUARD TOTAL INTL STOCK	921909768	VXUS	1,834.00	54.44	99,842.96	64.74	118,733.16	18,890.20	0.27
VANGUARD TOTAL INTL STOCK	921909768	VXUS	2,586.00	56.19	145,307.34	64.74	167,417.64	22,110.30	0.38
VANGUARD TOTAL INTL STOCK	921909768	VXUS	1,932.00	53.53	103,419.96	64.74	125,077.68	21,657.72	0.28
VANGUARD TOTAL INTL STOCK	921909768	VXUS	2,586.00	56.52	146,160.72	64.74	167,417.64	21,256.92	0.38

Detail of Securities Held & Market Analytics

For the Month Ending September 30, 2024

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 - Equity										
VANGUARD TOTAL INTL STOCK		921909768	VXUS	18,820.00	47.86	900,721.44	64.74	1,218,406.80	317,685.36	2.77
VANGUARD TOTAL INTL STOCK		921909768	VXUS	6,979.00	65.36	456,147.44	64.74	451,820.46	(4,326.98)	1.03
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	12,746.00	169.04	2,154,583.84	283.16	3,609,157.36	1,454,573.52	8.21
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	276.00	216.57	59,773.32	283.16	78,152.16	18,378.84	0.19
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	1,546.00	226.20	349,704.89	283.16	437,765.36	88,060.47	0.99
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	20,572.00	204.03	4,197,305.16	283.16	5,825,167.52	1,627,862.36	13.23
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	764.00	191.48	146,290.72	283.16	216,334.24	70,043.52	0.49
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	433.00	233.91	101,283.03	283.16	122,608.28	21,325.25	0.28
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	624.00	198.23	123,695.52	283.16	176,691.84	52,996.32	0.40
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	4,809.00	195.75	941,361.75	283.16	1,361,716.44	420,354.69	3.09
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	625.00	199.57	124,731.25	283.16	176,975.00	52,243.75	0.40
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	2,635.00	261.82	689,895.70	283.16	746,126.60	56,230.90	1.69
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	2,772.00	225.32	624,587.04	283.16	784,919.52	160,332.48	1.78
Security Type Sub-Total				140,721.00		14,271,114.60	4,220.43	19,328,314.12	5,057,199.52	43.90
Money Market Mutual Fund										
FIRST AM GOV OBLIG-Z		31846V567	FGZXX	1,378,248.66	1.00	1,378,248.66	100.00	1,378,248.66	0.00	3.13
DTD 01/01/2010 0.000%										
Security Type Sub-Total				1,378,248.66		1,378,248.66	100.00	1,378,248.66	0.00	3.13
Mutual Fund - Bond										
BAIRD CORE PLUS BOND-INST		057071870	BCOIX	459,524.98	10.94	5,026,559.01	10.41	4,783,655.03	(242,903.98)	10.86
BBH LIMITED DURATION-I		05528X851	BBBIX	0.03	10.29	0.35	10.44	0.35	0.00	0.00
DOUBLELINE CORE FIX INC-I		258620301	DBLFX	194,651.16	10.46	2,035,793.00	9.49	1,847,239.56	(188,553.44)	4.19
NYLI MACKAY HIGH YILD CBF-R6		56063N881	MHYSX	133,755.27	5.18	693,230.21	5.25	702,215.20	8,984.99	1.59
PGIM TOTAL RETURN BOND-R6		74440B884	PTRQX	312,222.22	13.45	4,199,084.06	12.31	3,843,455.53	(355,628.53)	8.73
VOYA INTERMEDIATE BOND-R6		92913L569	IIBZX	207,665.67	10.03	2,083,151.44	8.98	1,864,837.71	(218,313.73)	4.23
Security Type Sub-Total				1,307,819.34		14,037,818.07	56.88	13,041,403.38	(996,414.69)	29.60

Detail of Securities Held & Market Analytics

For the Month Ending September 30, 2024

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										
GLDMN SCHS GQG PRT INTL-INST		38147N293	GSIMX	34,602.03	19.28	667,118.97	23.24	804,151.12	137,032.15	1.83
HRDNG LVNR INTL EQTY-INST		412295107	HLMIX	18,363.09	28.95	531,566.14	28.85	529,775.04	(1,791.10)	1.20
HRTFRD SCHR EM MRKT EQ-SDR		41665H789	SEMTX	20,199.83	15.19	306,926.65	17.97	362,991.00	56,064.35	0.82
JOHCM INTERNATIONAL SEL-INST		46653M849	JOHIX	21,077.91	26.06	549,380.76	25.17	530,530.98	(18,849.78)	1.20
Security Type Sub-Total				94,242.86		2,054,992.52	95.23	2,227,448.14	172,455.62	5.05
Separate Account										
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	49,000.00	1.00	49,000.00	109.13	53,473.04	4,473.04	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	49,000.00	1.00	49,000.00	109.13	53,473.04	4,473.04	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	45,325.00	1.00	45,325.00	109.13	49,462.57	4,137.57	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	45,325.00	1.00	45,325.00	109.13	49,462.57	4,137.57	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	45,325.00	1.00	45,325.00	109.13	49,462.57	4,137.57	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	20,442.35	1.00	20,442.35	109.13	22,308.46	1,866.11	0.05
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	45,325.00	1.00	45,325.00	109.13	49,462.57	4,137.57	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	21,070.00	1.00	21,070.00	109.13	22,993.41	1,923.41	0.05
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	45,325.00	1.00	45,325.00	109.13	49,462.57	4,137.57	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	49,980.00	1.00	49,980.00	109.13	54,542.50	4,562.50	0.12
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --		GOLUB0090	F_GOLUB	180,000.00	1.00	180,000.00	114.47	206,043.30	26,043.30	0.47
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --		GOLUB0090	F_GOLUB	1,206,958.00	1.00	1,206,958.00	114.47	1,381,586.70	174,628.70	3.14

Detail of Securities Held & Market Analytics

For the Month Ending **September 30, 2024**

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										
NB SOF V		NBSOFV007	F_NBF	180,319.43	1.00	180,319.43	140.06	252,561.58	72,242.15	0.57
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV007	F_NBF	309,750.00	1.00	309,750.00	140.06	433,846.47	124,096.47	0.99
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV007	F_NBF	147,000.00	1.00	147,000.00	140.06	205,893.24	58,893.24	0.47
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV007	F_NBF	105,000.00	1.00	105,000.00	140.06	147,066.60	42,066.60	0.33
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV007	F_NBF	164,375.49	1.00	164,375.49	140.06	230,229.95	65,854.46	0.52
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV007	F_NBF	252,000.00	1.00	252,000.00	140.06	352,959.84	100,959.84	0.80
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV007	F_NBF	127,930.57	1.00	127,930.57	140.06	179,183.94	51,253.37	0.41
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV007	F_NBF	130,837.59	1.00	130,837.59	140.06	183,255.61	52,418.02	0.42
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV007	F_NBF	80,433.93	1.00	80,433.93	140.06	112,658.52	32,224.59	0.26
DTD 01/01/2010 0.000%	--									
Security Type Sub-Total				3,300,722.36		3,300,722.36	2,580.79	4,139,389.05	838,666.69	9.39
Managed Account Sub-Total				6,267,384.22		38,860,655.11	7,834.45	44,039,764.10	5,179,108.99	99.99
Securities Sub-Total				\$6,267,384.22		\$38,860,655.11	\$7,834.45	\$44,039,764.10	\$5,179,108.99	99.99%
Accrued Interest								\$0.00		
Total Investments								\$44,039,764.10		

Portfolio Summary and Statistics

For the Month Ending **September 30, 2024**

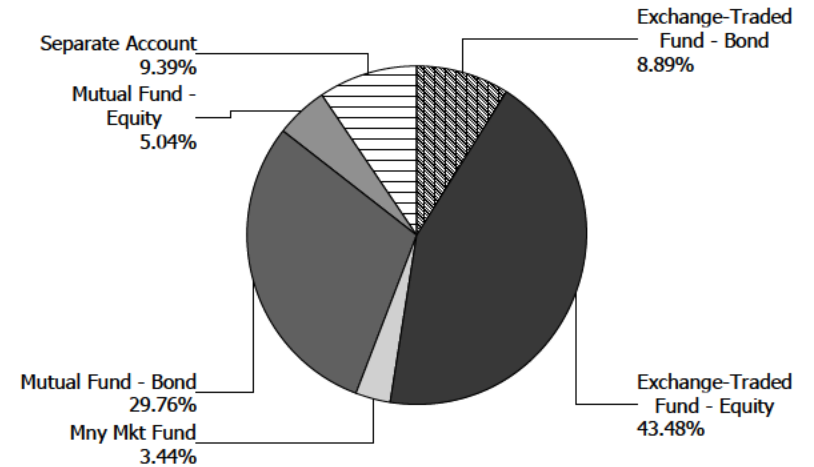
SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]

Account Summary

Description	Par Value	Market Value	Percent
Separate Account	3,300,722.36	4,139,388.91	9.39
Mutual Fund - Equity	94,062.97	2,223,182.45	5.04
Mutual Fund - Bond	1,314,295.35	13,118,814.01	29.76
Money Market Mutual Fund	1,515,383.86	1,515,383.86	3.44
Exchange-Traded Fund - Equity	139,918.00	19,168,980.88	43.48
Exchange-Traded Fund - Bond	45,591.00	3,919,299.42	8.89
Managed Account Sub-Total	6,409,973.54	44,085,049.53	100.00%
Accrued Interest		0.00	
Total Portfolio	6,409,973.54	44,085,049.53	

Unsettled Trades **0.00** **0.00**

Sector Allocation



Detail of Securities Held & Market Analytics

For the Month Ending **September 30, 2024**

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 5-10Y INV GRADE CORP	464288638	IGIB	631.00	56.68	35,765.08	53.72	33,897.32	(1,867.76)	0.08
ISHARES 5-10Y INV GRADE CORP	464288638	IGIB	633.00	56.98	36,068.34	53.72	34,004.76	(2,063.58)	0.08
ISHARES 5-10Y INV GRADE CORP	464288638	IGIB	2,405.00	60.30	145,021.50	53.72	129,196.60	(15,824.90)	0.29
ISHARES 5-10Y INV GRADE CORP	464288638	IGIB	982.00	61.00	59,902.00	53.72	52,753.04	(7,148.96)	0.12
ISHARES 5-10Y INV GRADE CORP	464288638	IGIB	1,779.00	57.66	102,578.92	53.72	95,567.88	(7,011.04)	0.22
ISHARES 5-10Y INV GRADE CORP	464288638	IGIB	1,113.00	61.12	68,026.56	53.72	59,790.36	(8,236.20)	0.14
ISHARES 5-10Y INV GRADE CORP	464288638	IGIB	7,130.00	50.32	358,781.60	53.72	383,023.60	24,242.00	0.87
ISHARES CORE U.S. AGGREGATE	464287226	AGG	3,372.00	99.12	334,232.64	101.27	341,482.44	7,249.80	0.77
ISHARES CORE U.S. AGGREGATE	464287226	AGG	3,317.00	96.40	319,758.80	101.27	335,912.59	16,153.79	0.76
ISHARES CORE U.S. AGGREGATE	464287226	AGG	17,957.00	98.64	1,771,278.48	101.27	1,818,505.39	47,226.91	4.13
ISHARES CORE U.S. AGGREGATE	464287226	AGG	6,272.00	92.76	581,790.09	101.27	635,165.44	53,375.35	1.44
Security Type Sub-Total			45,591.00		3,813,204.01	781.12	3,919,299.42	106,095.41	8.90
Exchange-Traded Fund - Equity									
VANGUARD FTSE DEVELOPED ETF	921943858	VEA	2,484.00	39.67	98,540.28	52.81	131,180.04	32,639.76	0.31
VANGUARD FTSE DEVELOPED ETF	921943858	VEA	2,211.00	42.17	93,237.87	52.81	116,762.91	23,525.04	0.26
VANGUARD FTSE DEVELOPED ETF	921943858	VEA	4,430.00	49.80	220,614.00	52.81	233,948.30	13,334.30	0.53
VANGUARD FTSE DEVELOPED ETF	921943858	VEA	6,915.00	38.85	268,647.75	52.81	365,181.15	96,533.40	0.83
VANGUARD FTSE DEVELOPED ETF	921943858	VEA	2,614.00	37.16	97,136.24	52.81	138,045.34	40,909.10	0.31
VANGUARD TOTAL INTL STOCK	921909768	VXUS	6,003.00	61.64	370,024.92	64.74	388,634.22	18,609.30	0.88
VANGUARD TOTAL INTL STOCK	921909768	VXUS	632.00	64.34	40,662.88	64.74	40,915.68	252.80	0.09
VANGUARD TOTAL INTL STOCK	921909768	VXUS	18,935.00	47.86	906,225.31	64.74	1,225,851.90	319,626.59	2.78
VANGUARD TOTAL INTL STOCK	921909768	VXUS	1,375.00	54.44	74,855.00	64.74	89,017.50	14,162.50	0.20
VANGUARD TOTAL INTL STOCK	921909768	VXUS	3,770.00	52.06	196,266.20	64.74	244,069.80	47,803.60	0.55
VANGUARD TOTAL INTL STOCK	921909768	VXUS	8,570.00	52.50	449,925.00	64.74	554,821.80	104,896.80	1.26
VANGUARD TOTAL INTL STOCK	921909768	VXUS	2,469.00	56.19	138,733.11	64.74	159,843.06	21,109.95	0.36
VANGUARD TOTAL INTL STOCK	921909768	VXUS	580.00	56.00	32,480.00	64.74	37,549.20	5,069.20	0.09
VANGUARD TOTAL INTL STOCK	921909768	VXUS	2,875.00	51.81	148,953.46	64.74	186,127.50	37,174.04	0.42
VANGUARD TOTAL INTL STOCK	921909768	VXUS	2,470.00	56.52	139,604.40	64.74	159,907.80	20,303.40	0.36
VANGUARD TOTAL INTL STOCK	921909768	VXUS	17,679.00	52.12	921,429.48	64.74	1,144,538.46	223,108.98	2.60

Detail of Securities Held & Market Analytics

For the Month Ending **September 30, 2024**

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 - Equity										
VANGUARD TOTAL INTL STOCK		921909768	VXUS	6,883.00	65.36	449,872.88	64.74	445,605.42	(4,267.46)	1.01
VANGUARD TOTAL INTL STOCK		921909768	VXUS	1,714.00	53.53	91,750.42	64.74	110,964.36	19,213.94	0.25
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	983.00	191.48	188,224.84	283.16	278,346.28	90,121.44	0.63
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	4,931.00	195.75	965,243.25	283.16	1,396,261.96	431,018.71	3.17
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	499.00	198.23	98,916.77	283.16	141,296.84	42,380.07	0.32
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	1,551.00	226.20	350,835.89	283.16	439,181.16	88,345.27	1.00
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	2,635.00	261.82	689,895.70	283.16	746,126.60	56,230.90	1.69
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	12,287.00	169.04	2,076,994.48	283.16	3,479,186.92	1,402,192.44	7.89
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	138.00	216.57	29,886.66	283.16	39,076.08	9,189.42	0.09
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	433.00	233.91	101,283.03	283.16	122,608.28	21,325.25	0.28
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	20,562.00	204.03	4,195,264.86	283.16	5,822,335.92	1,627,071.06	13.21
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	500.00	199.57	99,785.00	283.16	141,580.00	41,795.00	0.32
VANGUARD TOTAL STOCK MKT ETF		922908769	VTI	2,790.00	225.32	628,642.80	283.16	790,016.40	161,373.60	1.79
Security Type Sub-Total				139,918.00		14,163,932.48	4,220.43	19,168,980.88	5,005,048.40	43.48
Money Market Mutual Fund										
FIRST AM GOV OBLIG-Z DTD 01/01/2010 0.000%		31846V567	FGZXX	1,515,383.86	1.00	1,515,383.86	100.00	1,515,383.86	0.00	3.44
Security Type Sub-Total				1,515,383.86		1,515,383.86	100.00	1,515,383.86	0.00	3.44
Mutual Fund - Bond										
BAIRD CORE PLUS BOND-INST		057071870	BCOIX	463,678.31	10.93	5,066,674.15	10.41	4,826,891.22	(239,782.93)	10.95
BBH LIMITED DURATION-I		05528X851	BBBIX	0.03	10.29	0.35	10.44	0.35	0.00	0.00
DOUBLELINE CORE FIX INC-I		258620301	DBLFX	194,175.49	10.46	2,030,945.60	9.49	1,842,725.40	(188,220.20)	4.18
NYLI MACKAY HIGH YILD CBF-R6		56063N881	MHYSX	133,401.44	5.18	691,231.39	5.25	700,357.57	9,126.18	1.59
PGIM TOTAL RETURN BOND-R6		74440B884	PTRQX	315,897.77	13.42	4,239,628.06	12.31	3,888,701.59	(350,926.47)	8.82
VOYA INTERMEDIATE BOND-R6		92913L569	IIBZX	207,142.31	10.03	2,077,606.35	8.98	1,860,137.88	(217,468.47)	4.22
Security Type Sub-Total				1,314,295.35		14,106,085.90	56.88	13,118,814.01	(987,271.89)	29.76

Detail of Securities Held & Market Analytics

For the Month Ending September 30, 2024

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										
GLDMN SCHS GQG PRT INTL-INST		38147N293	GSIMX	34,546.06	19.28	666,093.46	23.24	802,850.45	136,756.99	1.82
HRDNG LVNR INTL EQTY-INST		412295107	HLMIX	18,332.57	28.93	530,449.56	28.85	528,894.53	(1,555.03)	1.20
HRTFRD SCHR EM MRKT EQ-SDR		41665H789	SEMTX	20,162.83	15.19	306,364.44	17.97	362,326.10	55,961.66	0.82
JOHCM INTERNATIONAL SEL-INST		46653M849	JOHIX	21,021.51	26.08	548,223.76	25.17	529,111.37	(19,112.39)	1.20
Security Type Sub-Total				94,062.97		2,051,131.22	95.23	2,223,182.45	172,051.23	5.04
Separate Account										
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	45,325.00	1.00	45,325.00	109.13	49,462.55	4,137.55	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	45,325.00	1.00	45,325.00	109.13	49,462.55	4,137.55	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	45,325.00	1.00	45,325.00	109.13	49,462.55	4,137.55	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	45,325.00	1.00	45,325.00	109.13	49,462.55	4,137.55	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	49,000.00	1.00	49,000.00	109.13	53,473.03	4,473.03	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	45,325.00	1.00	45,325.00	109.13	49,462.55	4,137.55	0.11
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	20,442.35	1.00	20,442.35	109.13	22,308.46	1,866.11	0.05
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	49,980.00	1.00	49,980.00	109.13	54,542.49	4,562.49	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	21,070.00	1.00	21,070.00	109.13	22,993.40	1,923.40	0.05
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00020	SA407	49,000.00	1.00	49,000.00	109.13	53,473.03	4,473.03	0.12
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --		GOLUB0091	F_GOLUB	180,000.00	1.00	180,000.00	114.47	206,043.30	26,043.30	0.47
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --		GOLUB0091	F_GOLUB	1,206,958.00	1.00	1,206,958.00	114.47	1,381,586.70	174,628.70	3.13

Detail of Securities Held & Market Analytics

For the Month Ending **September 30, 2024**

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										
NB SOF V		NBSOFV008	F_NBF	80,433.93	1.00	80,433.93	140.06	112,658.52	32,224.59	0.26
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV008	F_NBF	130,837.59	1.00	130,837.59	140.06	183,255.61	52,418.02	0.42
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV008	F_NBF	105,000.00	1.00	105,000.00	140.06	147,066.60	42,066.60	0.33
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV008	F_NBF	252,000.00	1.00	252,000.00	140.06	352,959.84	100,959.84	0.80
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV008	F_NBF	180,319.43	1.00	180,319.43	140.06	252,561.58	72,242.15	0.57
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV008	F_NBF	309,750.00	1.00	309,750.00	140.06	433,846.47	124,096.47	0.98
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV008	F_NBF	164,375.49	1.00	164,375.49	140.06	230,229.95	65,854.46	0.52
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV008	F_NBF	127,930.57	1.00	127,930.57	140.06	179,183.94	51,253.37	0.41
DTD 01/01/2010 0.000%	--									
NB SOF V		NBSOFV008	F_NBF	147,000.00	1.00	147,000.00	140.06	205,893.24	58,893.24	0.47
DTD 01/01/2010 0.000%	--									
Security Type Sub-Total				3,300,722.36		3,300,722.36	2,580.79	4,139,388.91	838,666.55	9.37
Managed Account Sub-Total				6,409,973.54		38,950,459.83	7,834.45	44,085,049.53	5,134,589.70	99.99
Securities Sub-Total				\$6,409,973.54		\$38,950,459.83	\$7,834.45	\$44,085,049.53	\$5,134,589.70	99.99%
Accrued Interest								\$0.00		
Total Investments								\$44,085,049.53		

SunLine Transit Agency
CONSENT CALENDAR

DATE: December 4, 2024

APPROVE

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Ridership Report for September 2024

Summary:

Monthly Ridership			Monthly Variance	
	Sep-24	Sep-23	Net	Percent
Fixed Route	226,936	205,433	21,503	10.5%
SunRide	2,154	1,682	472	28.1%
Taxi Voucher*	198	171	27	15.8%
SunDial	9,204	9,858	-654	-6.6%
Total	238,492	217,144	21,348	9.8%

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

Yearly Ridership	
Fiscal Year 2024	666,589
Fiscal Year 2023	615,457
Ridership Increase	51,132

Fiscal year to date system ridership increased by 51,132 rides or 8.31% compared to the previous fiscal year. The baseline of the attached COVID-19 Recovery chart is calendar year 2020, this allows a comparison of three (3) years.

Recommendation:

Approve.



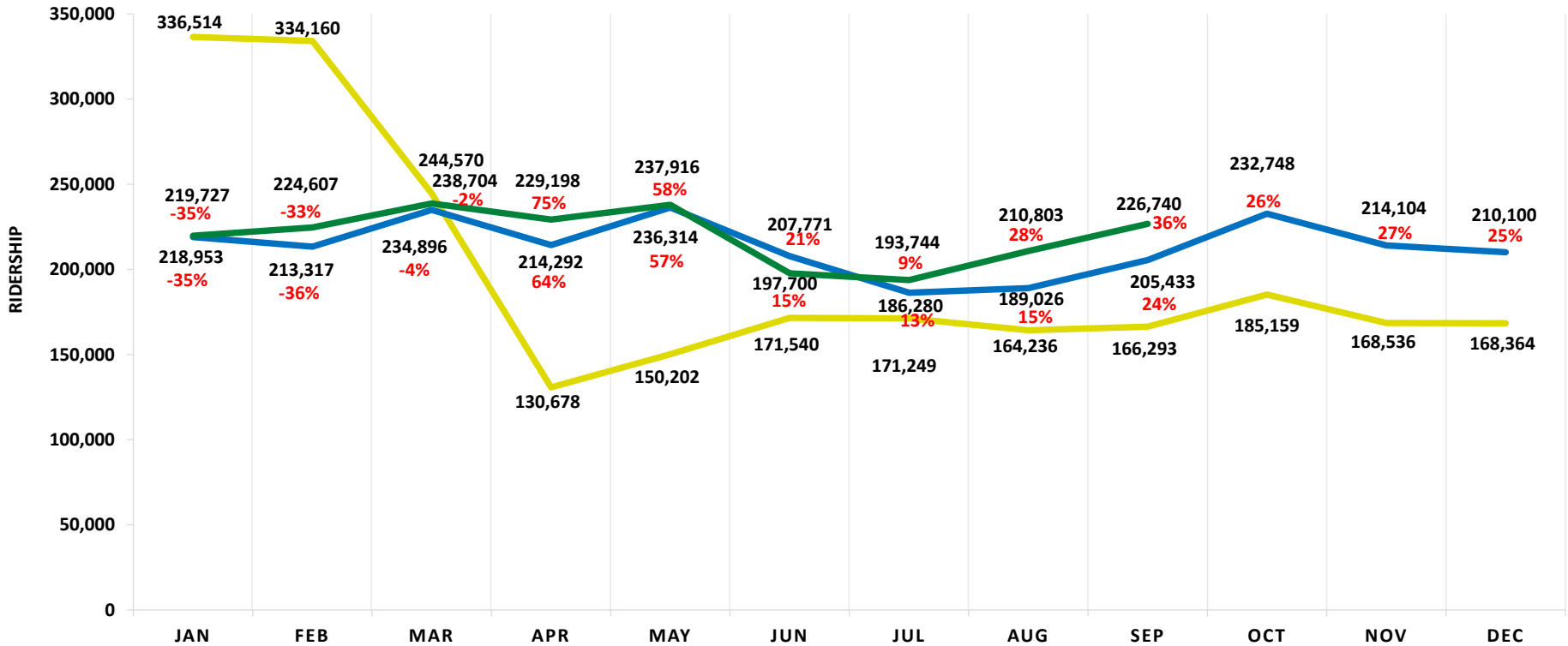
SunLine Transit Agency Monthly Ridership Report September 2024

Fixed Route	FY 2024		FY 2023		Monthly KPI		Bikes		Wheelchairs	
	Sep 2024	Sep 2023	YTD	YTD	Passengers/ Rev. Hours	Passengers/ Rev. Miles	Monthly	FYTD	Monthly	FYTD
	Route 1EV	43,553	44,479	135,520	137,319	16.3	1.5	1,827	5,399	229
Route 1WV	43,527	36,970	114,390	108,809	14.1	1.2	1,536	4,056	323	888
Route 2	63,549	57,369	187,835	165,588	17.6	1.3	1,801	5,672	502	1,744
Route 3	8,253	6,788	22,362	17,869	8.9	0.6	253	695	77	316
Route 4	20,258	16,603	55,733	48,034	9.9	0.7	605	1,748	108	289
Route 5	2,881	965	7,070	4,023	4.3	0.2	105	263	10	24
Route 6	4,454	2,267	12,194	8,747	7.3	0.6	134	369	27	83
Route 7	7,421	7,797	18,626	19,428	6.9	0.6	341	822	16	25
Route 8	14,866	14,358	46,835	39,867	10.4	0.7	410	1,341	175	406
Route 9	4,310	4,626	9,661	9,610	4.6	0.2	108	269	22	34
Route 10	4,730	4,073	8,417	6,696	10.5	0.2	41	95	8	27
Route 200 SB	184	254	350	352	13	1	-	-	1	1
Route 400 SB	-	-	-	-	-	-	-	-	-	-
Route 401 SB	-	-	-	-	-	-	-	-	-	-
Route 402 NB	-	-	-	-	-	-	-	-	-	-
Route 403 NB	-	-	-	-	-	-	-	-	-	-
Route 500 SB	144	135	233	362	23	2	-	-	-	-
Route 501 NB	-	-	-	-	-	-	-	-	-	-
Route 700 SB/NB	316	462	399	678	8	1	2	2	-	-
Route 701 SB/NB	958	934	1,408	1,580	49	5	6	10	1	2
Route 800 NB	3,939	2,411	5,063	3,690	125	14	-	-	5	5
Route 801 SB	2,674	2,951	3,491	4,482	91	14	-	-	-	-
Route 802 SB	722	574	878	1,058	17	1	-	-	-	-
Route 803 NB	197	1,417	1,018	2,692	110	3	-	-	-	-
Fixed Route Total	226,936	205,433	631,483	580,884	13.5	0.9	7,169	20,741	1,504	4,572
SunRide	2,154	1,682	6,240	4,381	2.0	0.1				
Taxi Voucher	198	171	512	515						
SunDial	9,204	9,858	28,354	29,677	0.9	0.2				
System Total	238,492	217,144	666,589	615,457	9.8	0.7				
	Sep-24	Sep-23								
Weekdays:	20	20								
Saturdays:	4	5								
Sundays:	6	5								
Total Days:	30	30								

Haul Pass COD contributed with 8,738 rides, CSUSB with 3,147 rides.
 Mobile Ticketing contributed with 41,892 rides, the total for September 2024 includes 150 paratransit mobile tickets.

Fixed Route Ridership COVID-19 Recovery

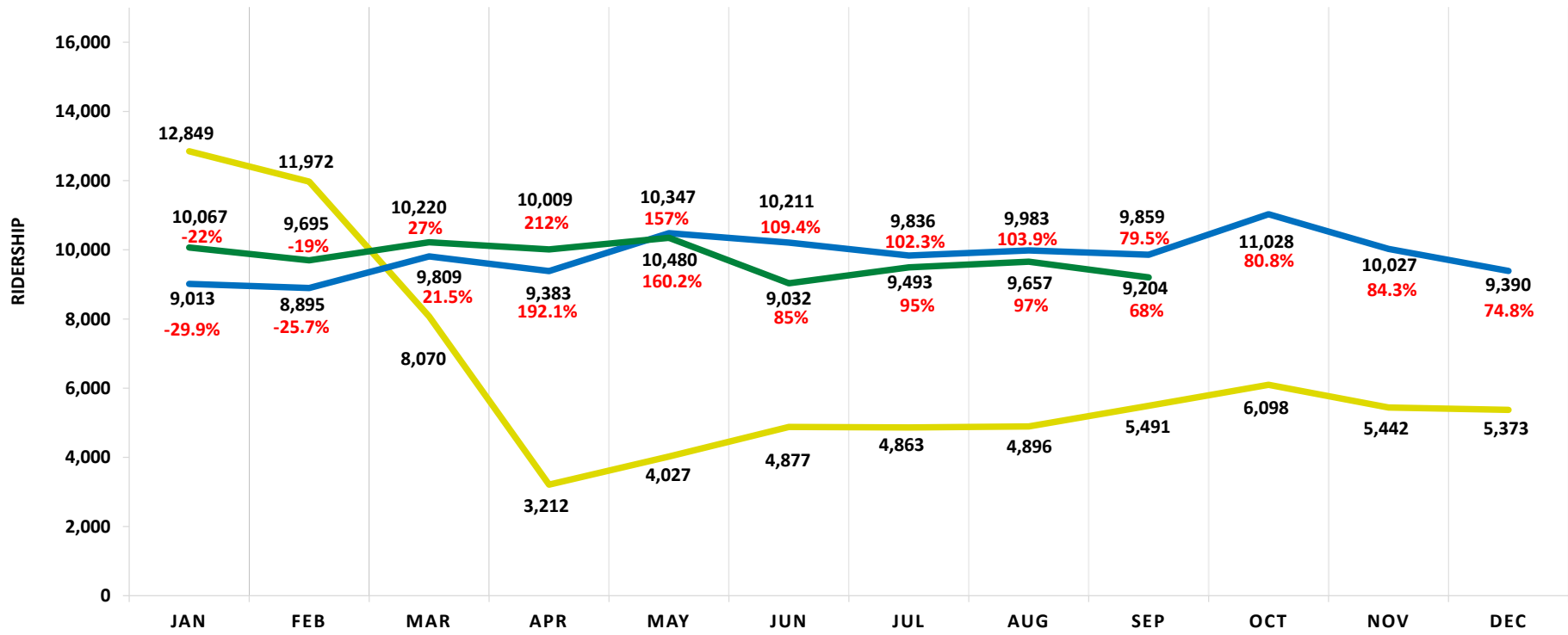
— CY 2020
 — CY 2023
 — CY 2024
 %VAR. 2020 vs 2023
 %VAR. 2020 vs 2024



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. 2023 and 2024 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 2023 & CY 2024. CY 2021/2022 have been removed to reflect the two (2) most recent years in recovery.

Paratransit Ridership COVID-19 Recovery

— CY 2020
 — CY 2023
 — CY 2024
 %VAR. 2020 vs 2023
 %VAR. 2020 vs 2024



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. 2023 and 2024 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 2023 & CY 2024. CY 2021/2022 have been removed to reflect the two (2) most recent years in recovery.

SunLine Transit Agency
CONSENT CALENDAR

DATE: December 4, 2024 **APPROVE**

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of SunDial Operational Notes for September 2024

Summary:

The attached report summarizes SunDial's operation for the month of September 2024. This report identifies that for the month of September, the on-time performance for SunDial did meet the internal service goal of 85% which is comparable to the fixed route service goal. The on-time performance for the month of September was 90.4%.

Fiscal-year-to-date, SunDial has maintained an on-time performance of 89.8%. Total vehicle miles for September 2024 decreased by 1,810 compared to September 2023. Total trips for the month of September were 8,817. When compared to September 2023, this is an decrease of 643 trips or 6.8%.

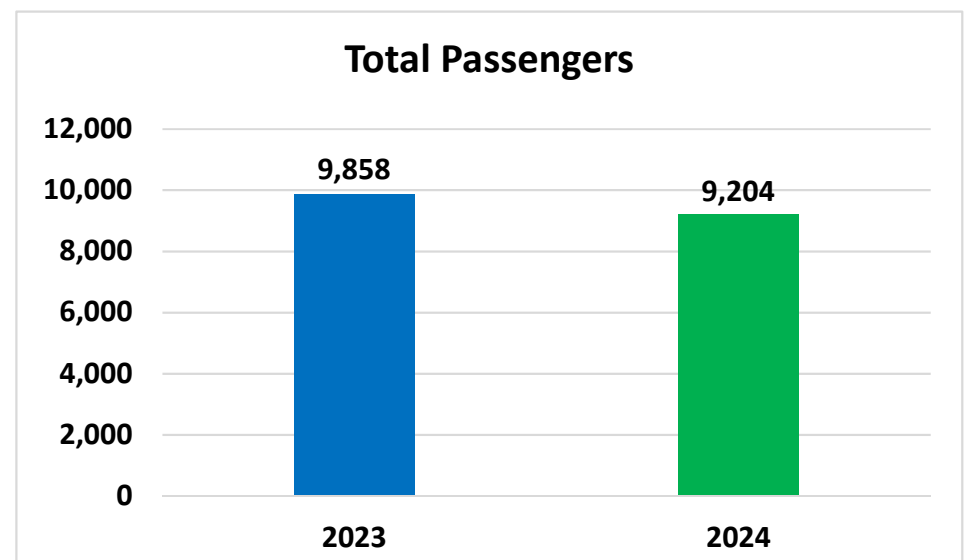
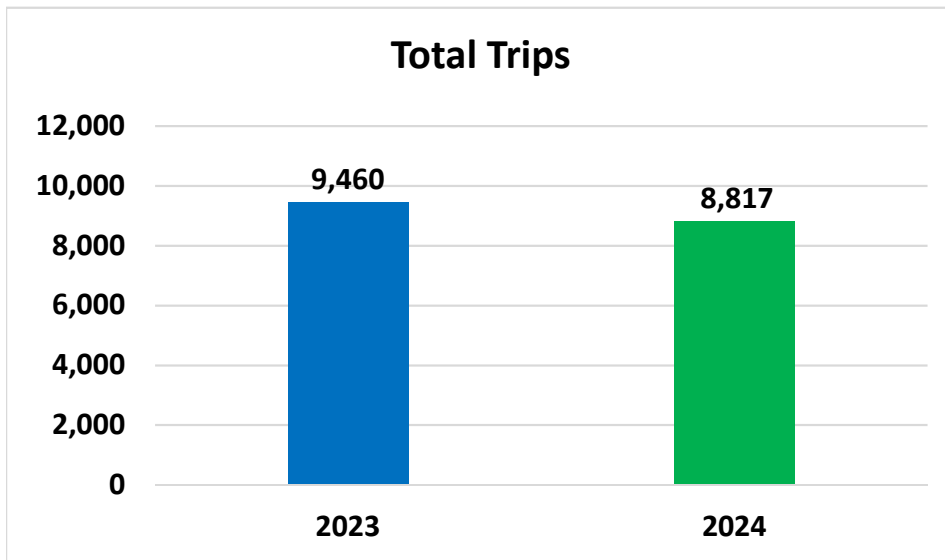
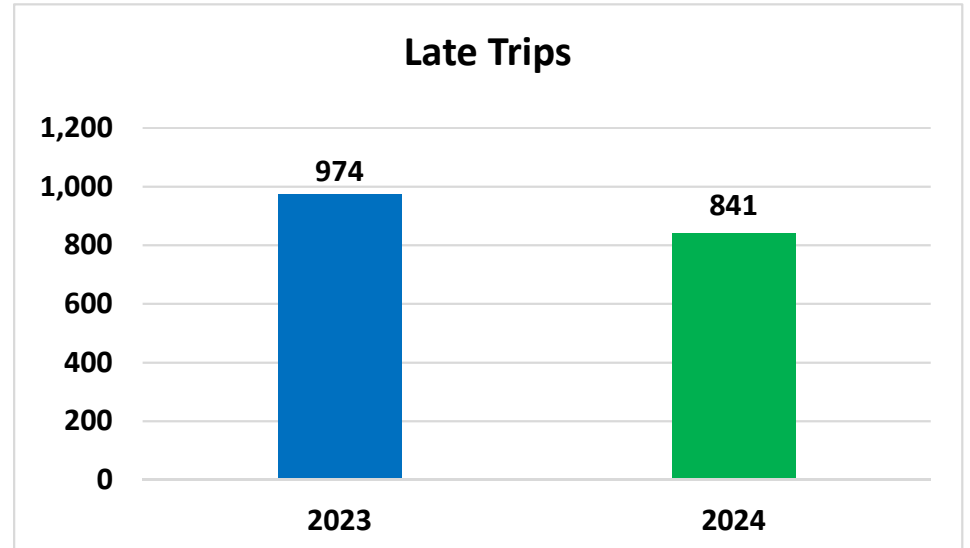
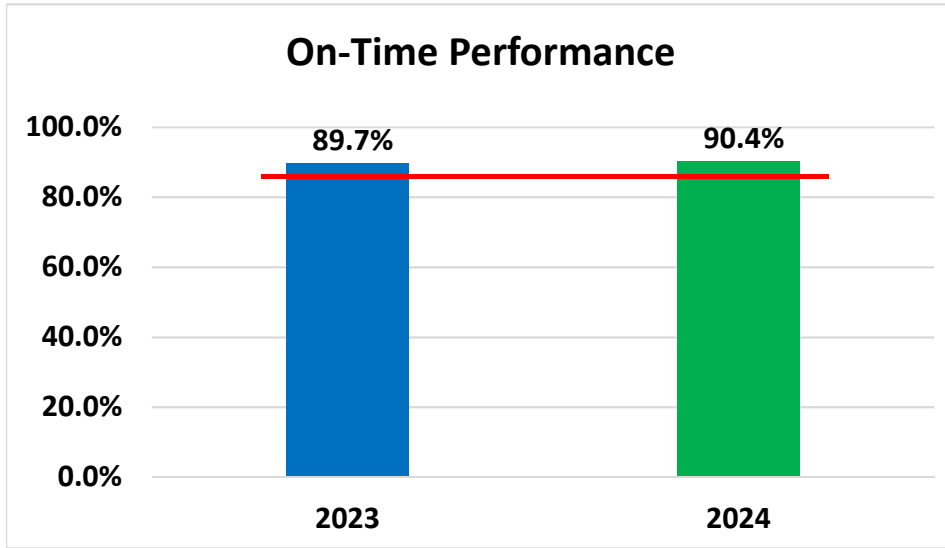
The total number of passengers for the month of September 2024 was 9,204, which indicates a decrease of 654 passengers or 6.6% when compared to September 2023. Mobility device boardings for September 2024 decreased by 319 or 21% when compared to September 2023. During this month, the field supervisors conducted a total of 90 onboard inspections and 92 safety evaluations, which included pre-trip inspections and trailing evaluations. The supervisors have exceeded their monthly on-board evaluations goal of 60 by 30, indicating an increase of 30% when compared to September 2023. Similarly, they have also exceeded their safety evaluations goal of 60 by 32, indicating an increase of 39% when compared to September 2023.

Recommendation:

Approve.

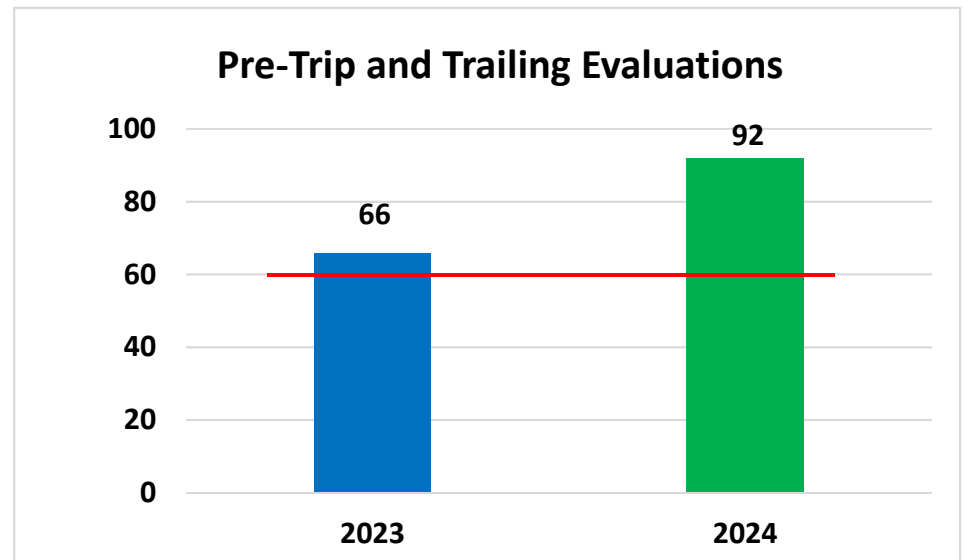
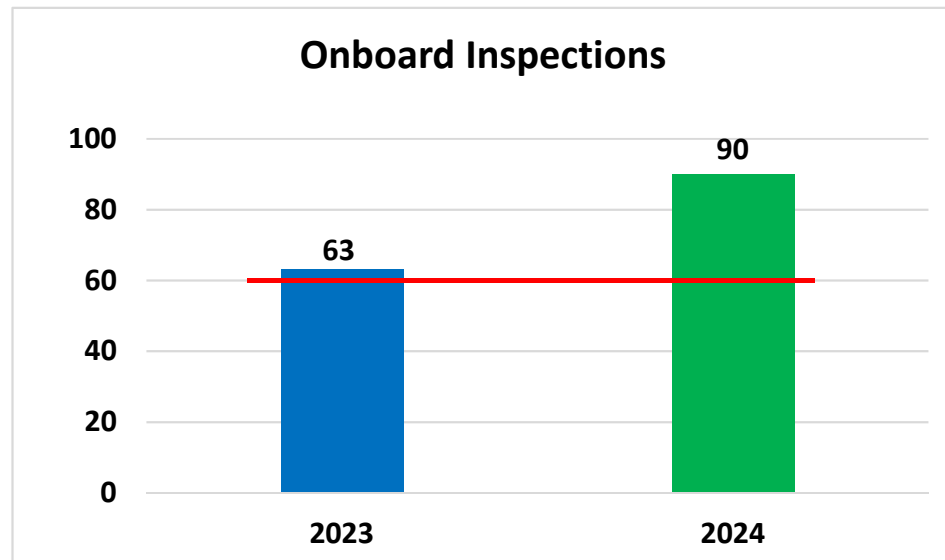
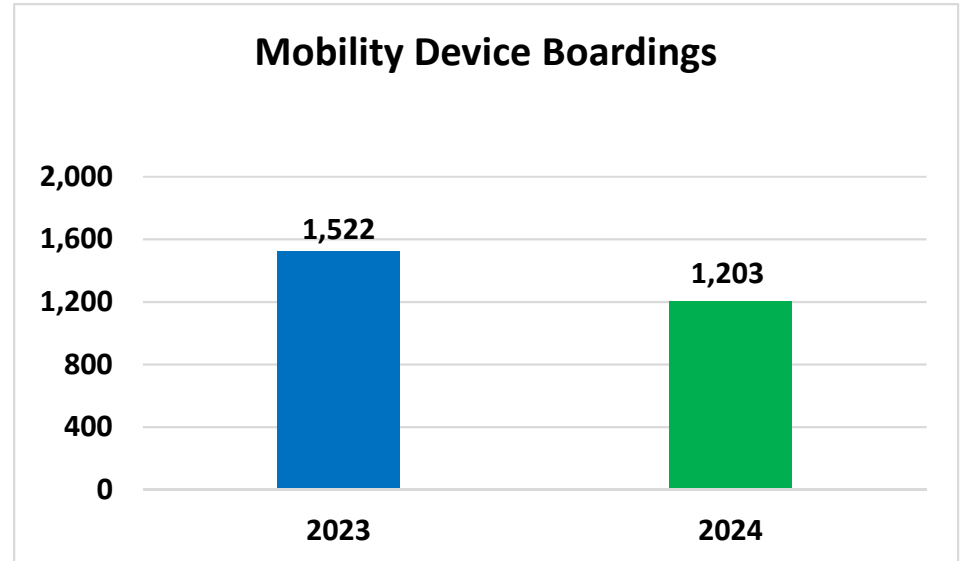
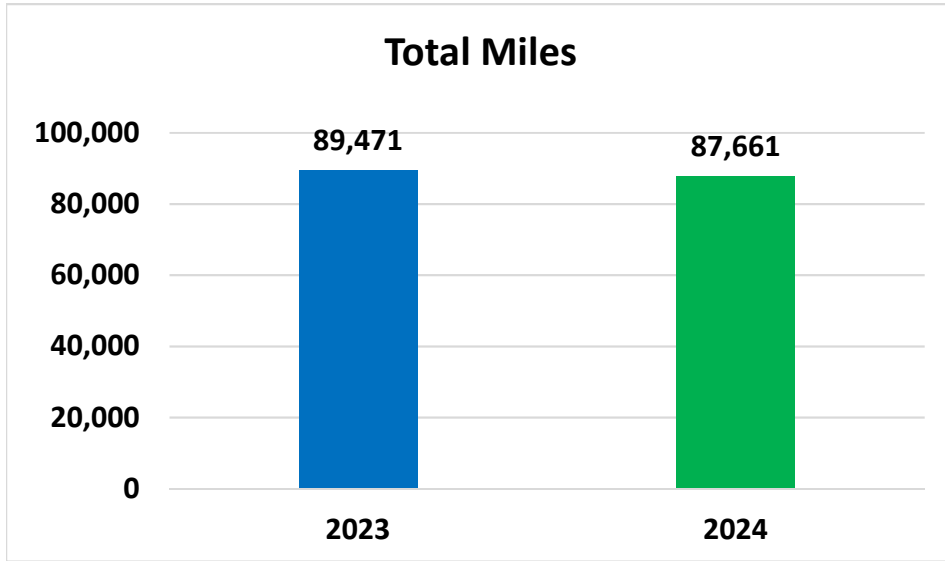
Paratransit Operational Charts

September 2023 vs. September 2024



Paratransit Operational Charts

September 2023 vs. September 2024



SunLine Transit Agency
CONSENT CALENDAR

DATE: December 4, 2024 **APPROVE**

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Metrics for September 2024

Summary:

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

SunRide

- SunRide has continued to see growth year-over-year. System-wide saw an increase of 26% over September 2023 and an increase of 5% over August 2024.
- Desert Hot Springs is up 37% over September 2023.
- Indio had its highest ridership to date with 412 trips by 445 passengers. This is a 19% increase over last month and a 56% increase over September 2023.
- Mecca/North Shore also had its highest ridership to date with 154 trips by 184 passengers. This represents a 170% increase over September 2023 and a 97% increase over August 2024. 42% of September trips occurred when SunRide supplemented Route 9 between 10:00am and 2:00pm.

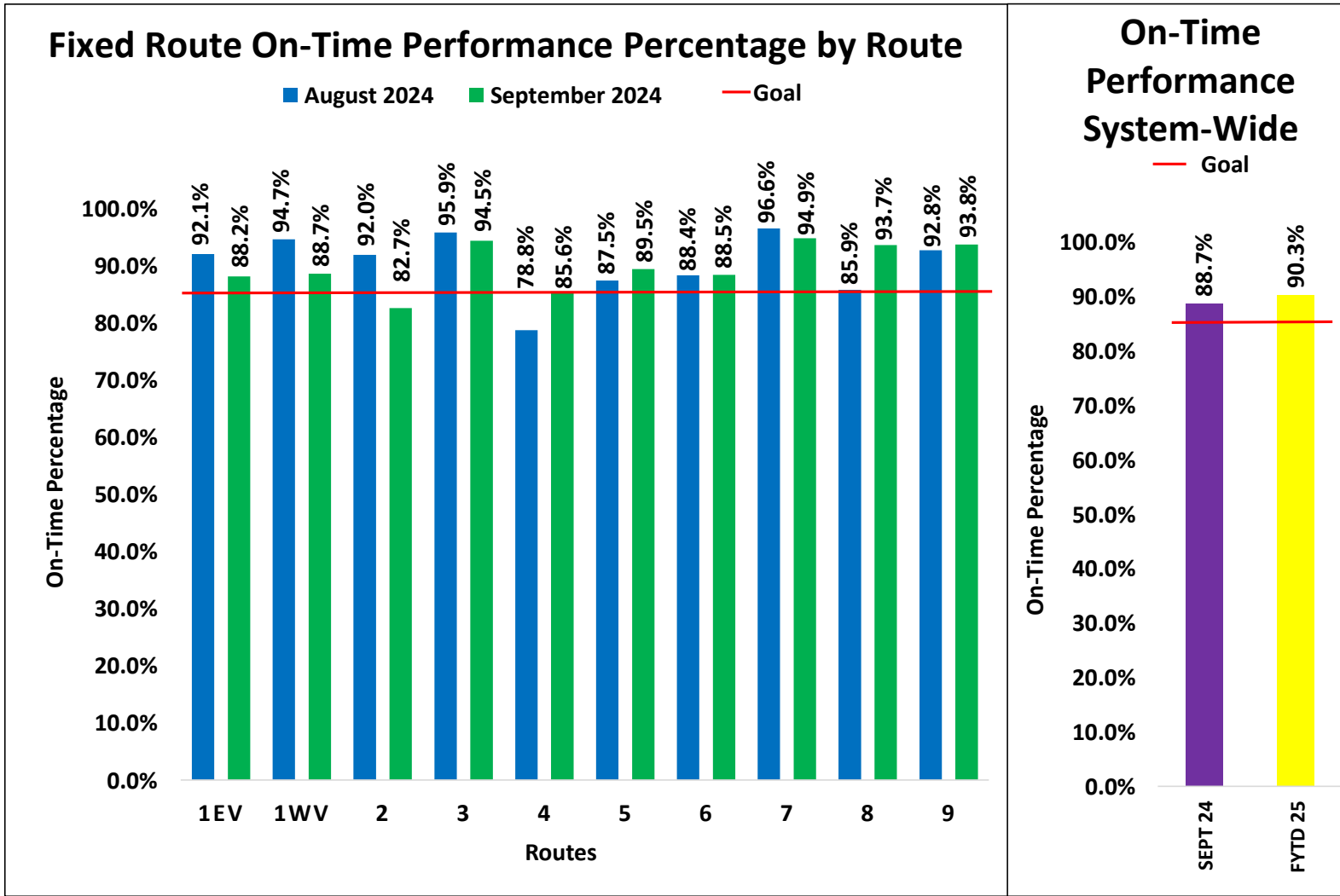
Fixed Route

- Fixed route's on-time performance had a decrease of 2.2% from August 2024 at 90.9% to September 2024 at 88.7%. For September, the Agency exceeded the service standard goal of 85%.

- Route 2 did not meet its service standard goal due to ongoing road work on Farrell Dr between Ramon Rd and Tahquitz Canyon Way along with sporadic closures on Gene Autry Trail due to weather.
- Late departures increased by 1.9% in September 2024 compared to the previous month.
- Early departures increased by 0.2% in September 2024 compared to the previous month.
- For the month of September 2024, 20% of SunLine's fixed route operator workforce was absent when compared to September 2023 at 21%.
- For the month of September 2024, workforce was at a total of 138 operators when compared to September 2023 at 143 operators.

Recommendation:

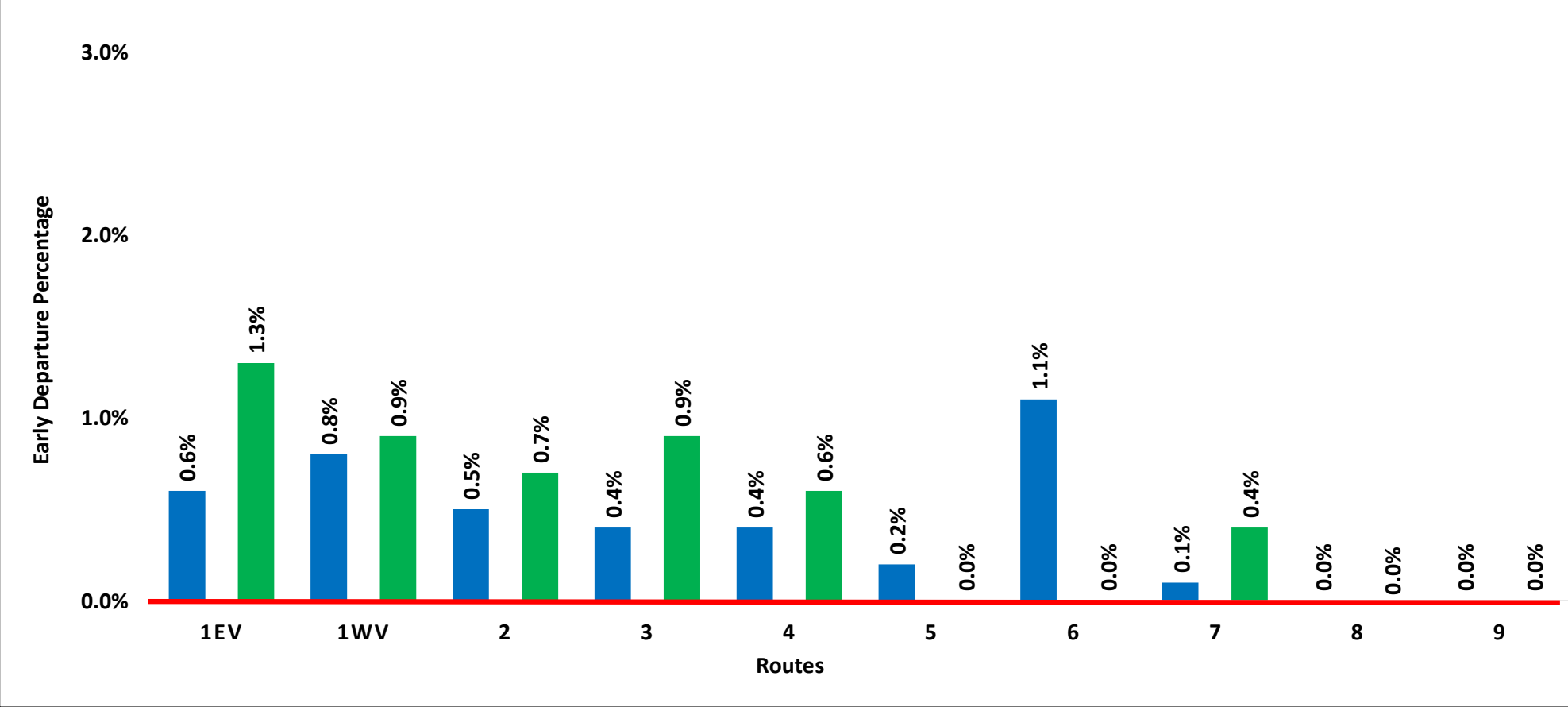
Approve.



On-Time: When a trip departs a time point within a range of zero (0) minutes early to five (5) minutes late.
 Goal: Minimum target for On-Time Performance is 85%.
 Note: For the month of September 2024, the Agency's on-time performance was at 88.7%, when compared to September 2023 at 85.9%. This is an increase of 2.8%.

Fixed Route Early Departure Percentage by Route

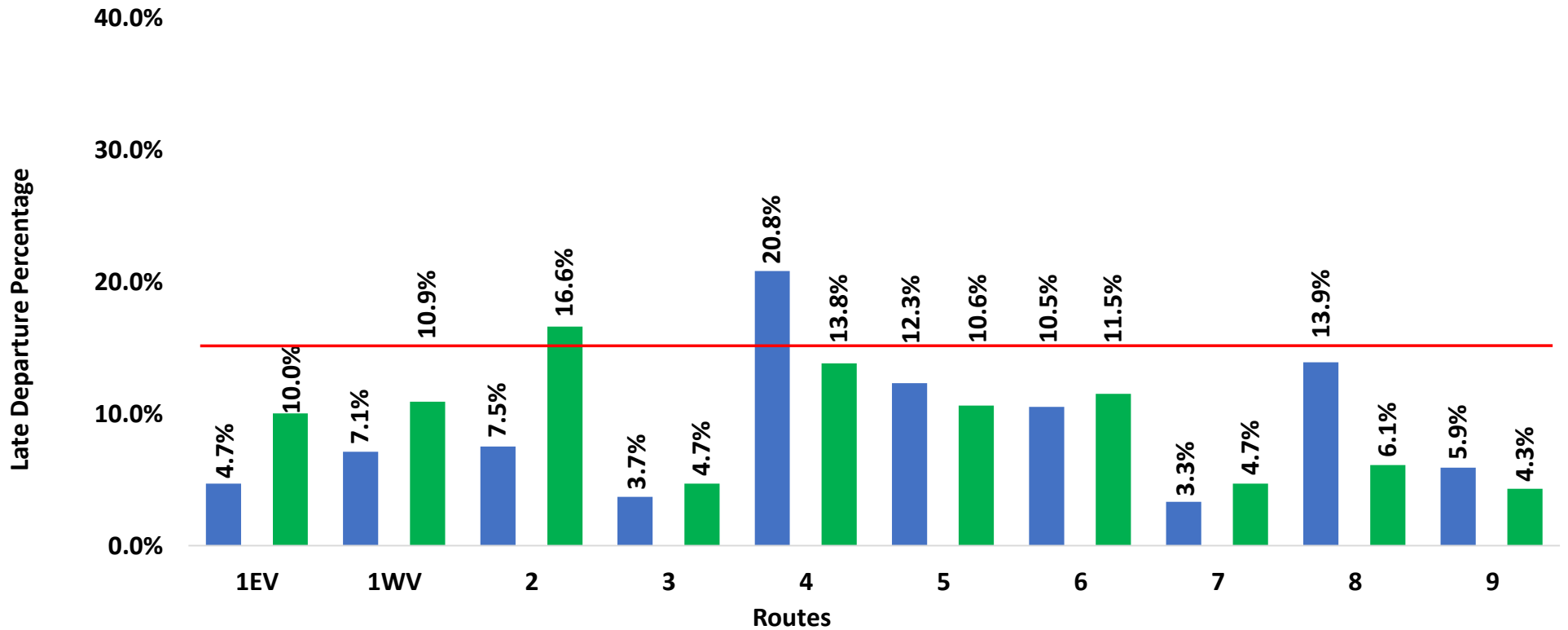
■ August 2024 ■ September 2024



Early Departure: When a bus leaves a time point ahead of the scheduled departure time.
Goal: To reduce early departures to 0%.

Fixed Route Late Departure Percentage by Route

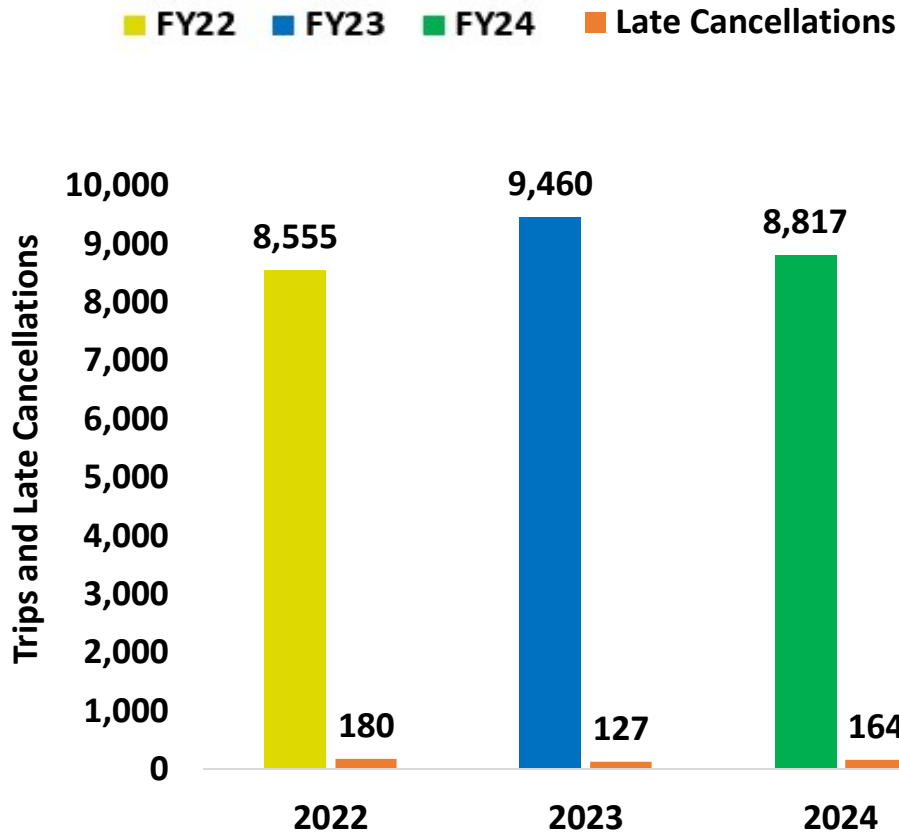
■ August 2024 ■ September 2024 — Goal



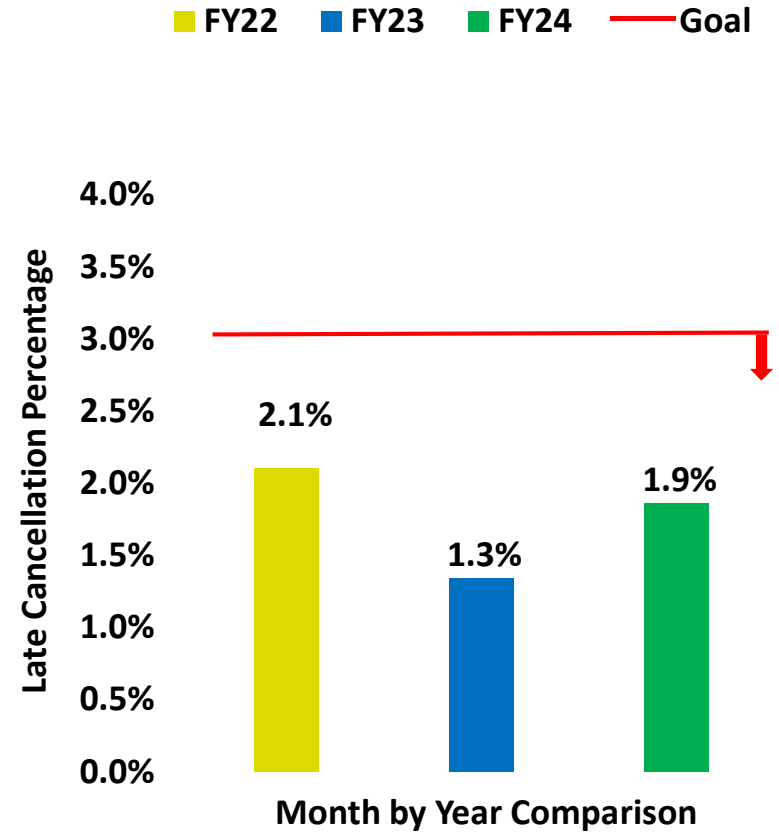
Late Departure: When a bus leaves a time point after the scheduled departure time and the route is running late with a departure greater than five (5) minutes.

Goal: To ensure late departures remain below 15%.

Paratransit Total Trips vs. Late Cancellations September



Late Cancellations by Percentage



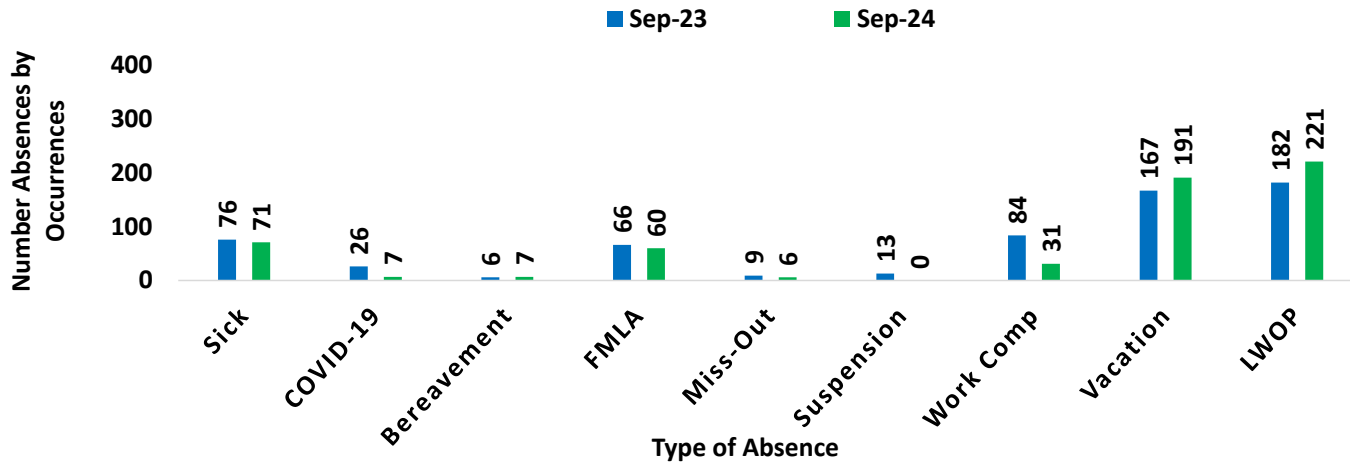
Trip: A one-way trip booked by the rider. A round trip is counted as two (2) trips.

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

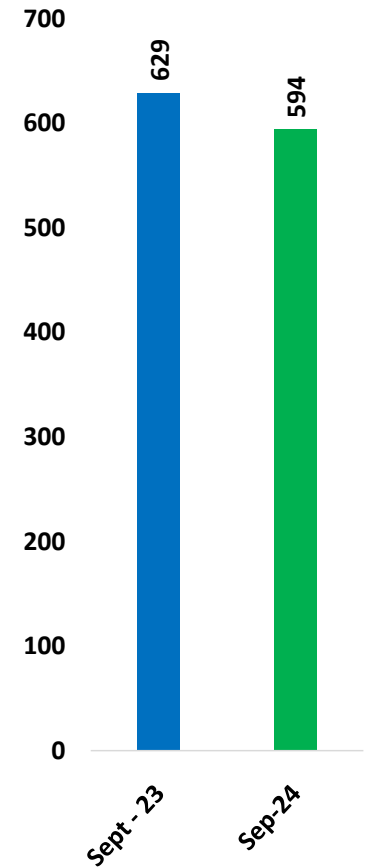
Goal for Late Cancellations: 3% or below.

Total Trips: Total one-way trips completed.

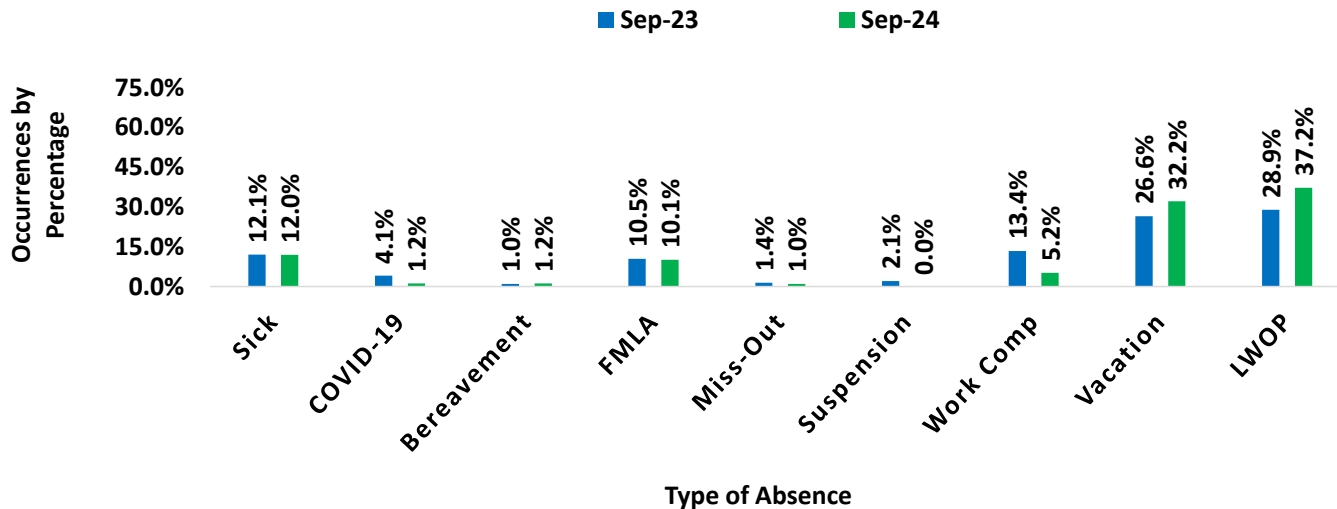
Fixed Route Operator Absence by Type



Fixed Route Total Absence Occurrences

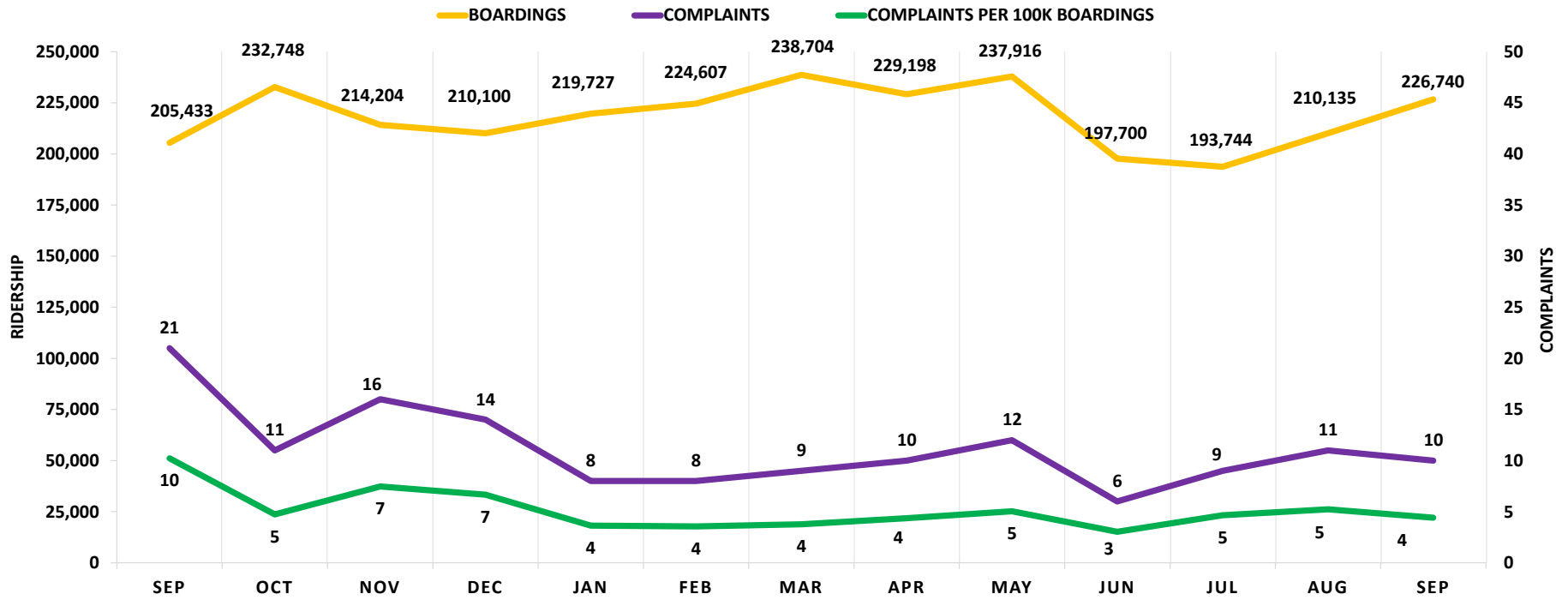


Fixed Route Operator Absence Type by Percentage



This chart includes unplanned/unscheduled and COVID-19 absences for Fixed Route drivers. For the month of September 2024, 20% of SunLine's fixed route operator workforce was absent when compared to September 2023 at 21%. For the month of September 2024, workforce was at a total of 138 operators when compared to September 2023 at 143 operators.

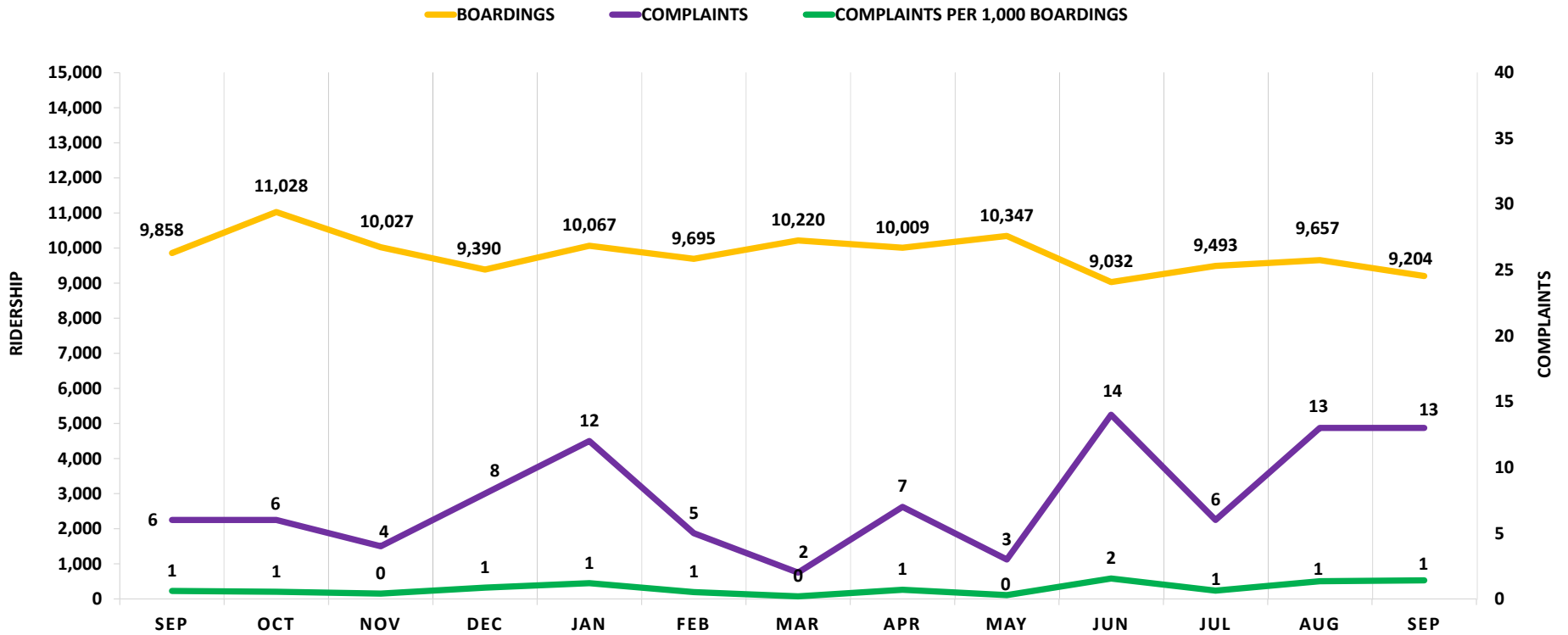
Fixed Route Customer Complaints September 2023 to September 2024



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 September, 99.99% of our total boardings did not receive a complaint.

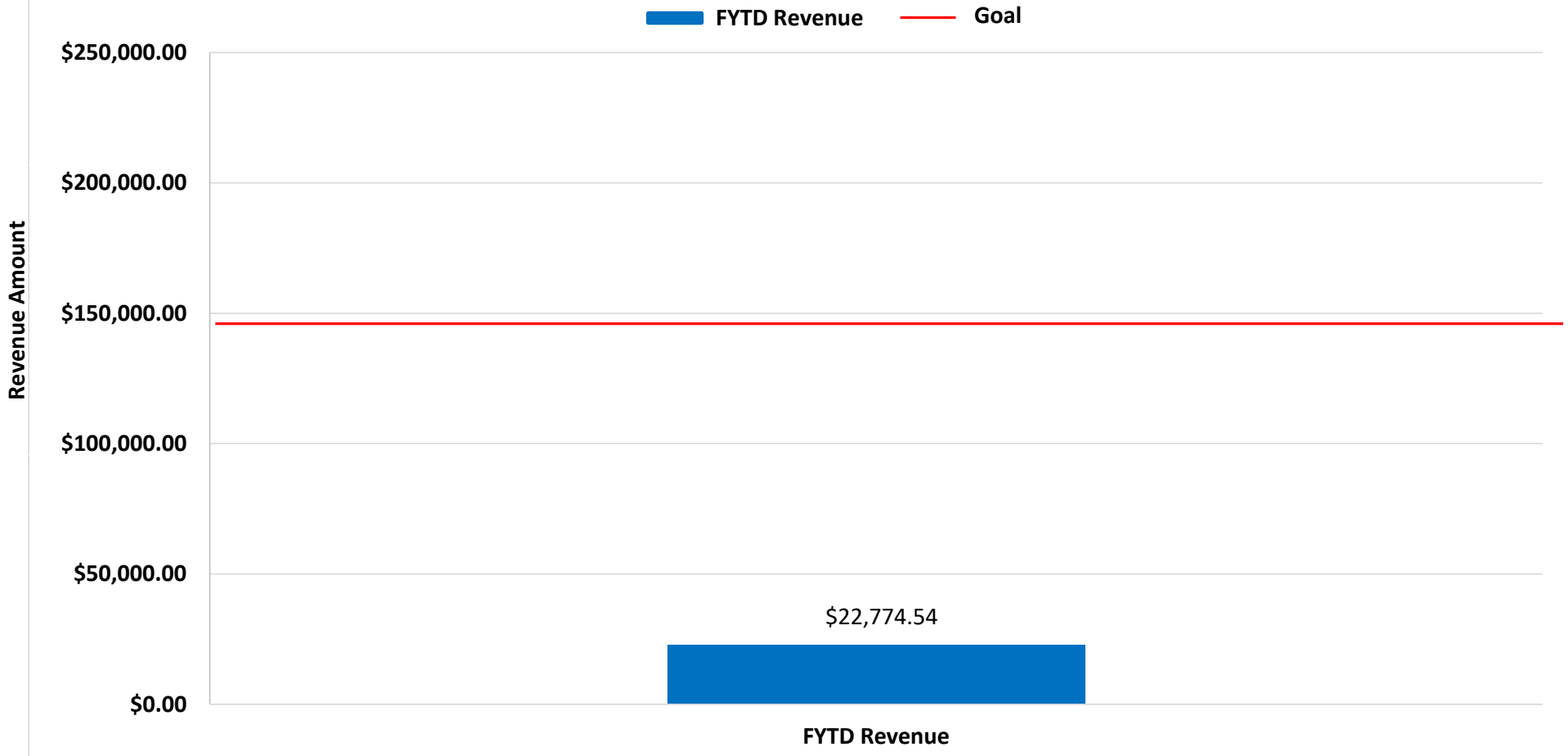
Paratransit Customer Complaints September 2023 to September 2024



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 September, 99.86% of our total boardings did not receive a complaint.

Advertising Revenue FYTD Revenue vs. Yearly Goal September 2024

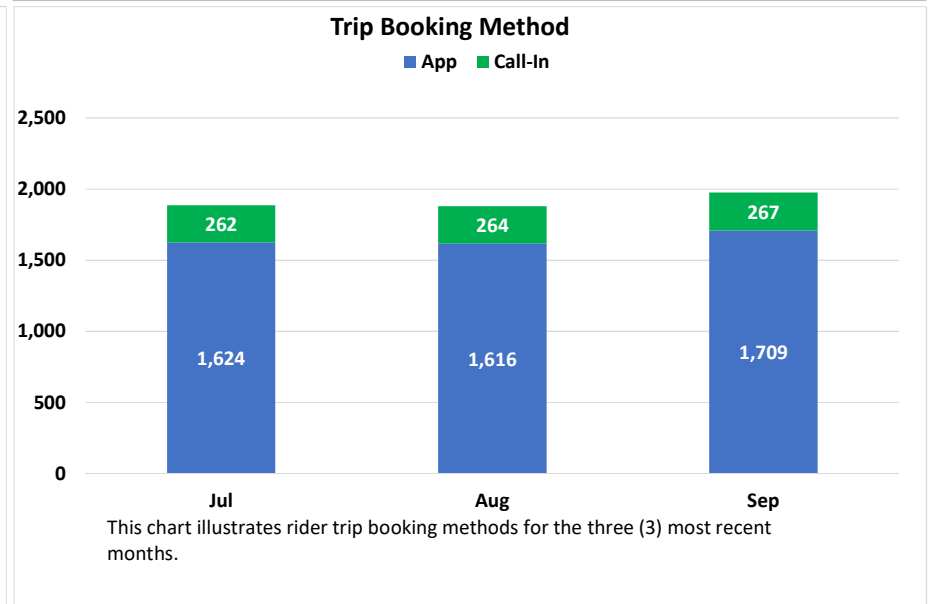
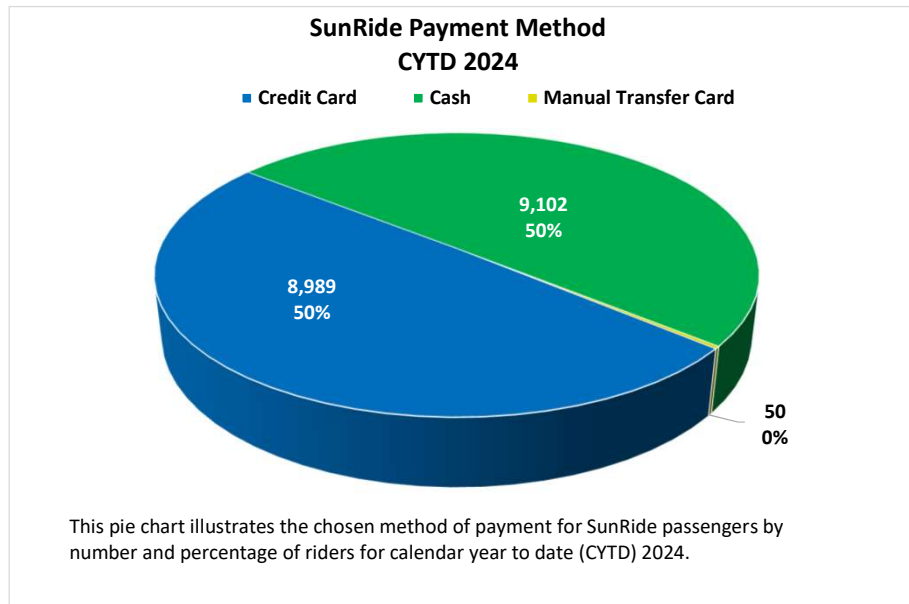
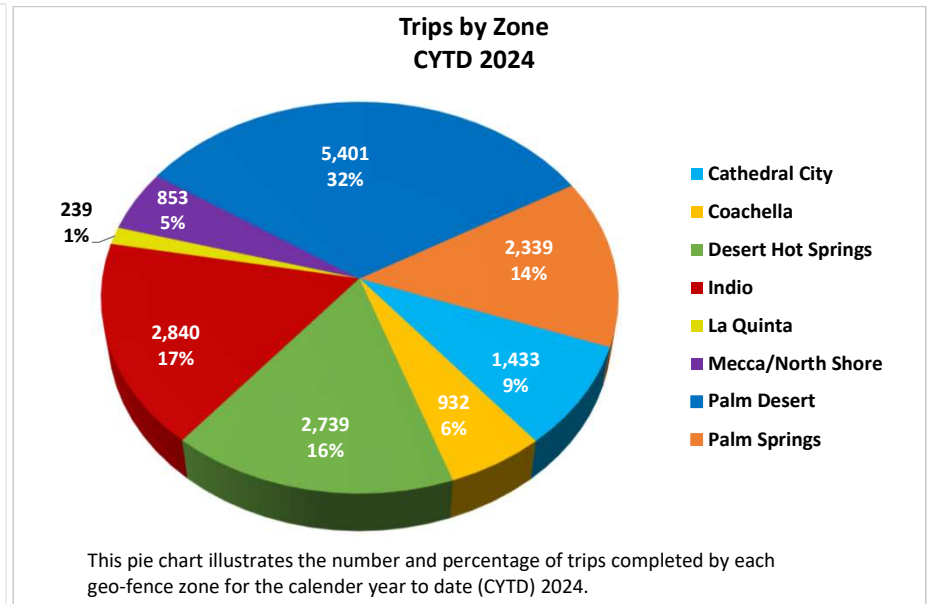
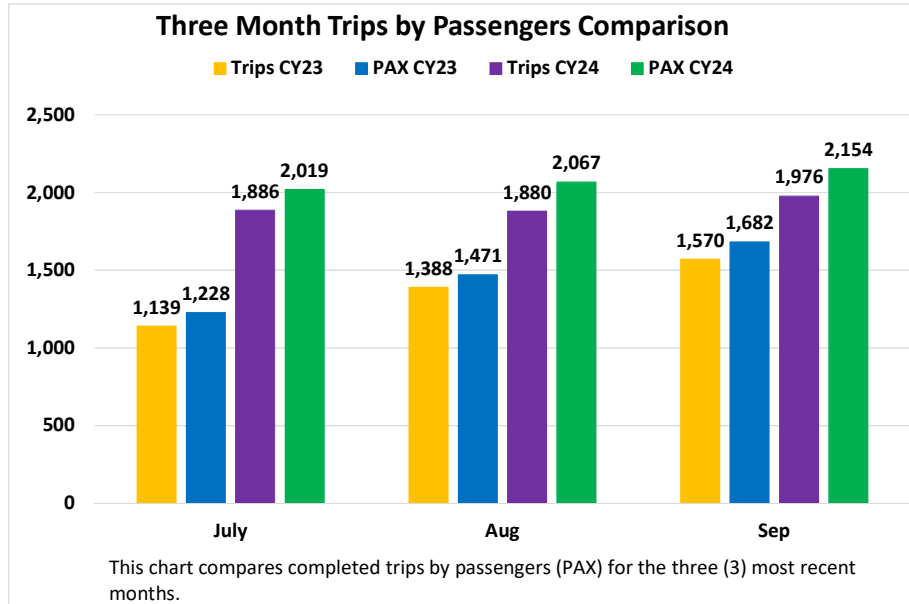


Advertising revenue tracks revenue of invoiced contracts for bus shelter and bus wrap advertising. The graph tracks FYTD revenue versus our yearly goal. The yearly goal for FY25 is \$150,000 (advertising revenues follow Finance Department reporting from the previous two (2) months).

SunRide System-Wide Metrics CYTD 2024

Total Completed Trips: 16,776

Total Number of Passengers: 18,141

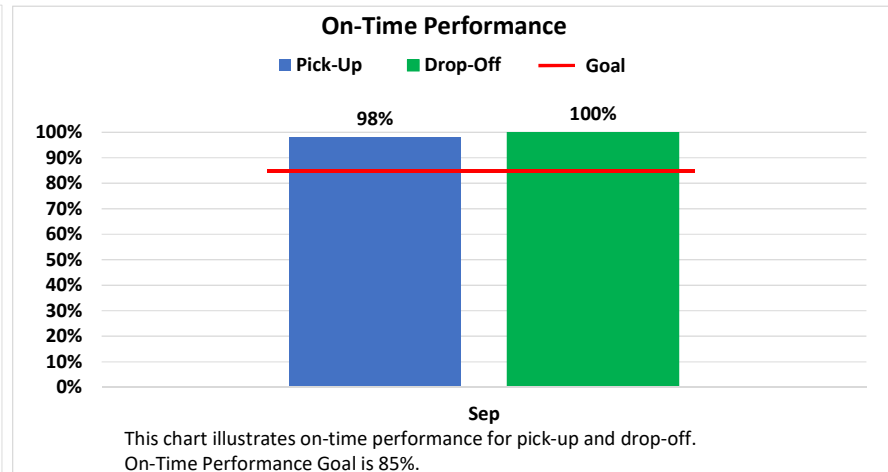
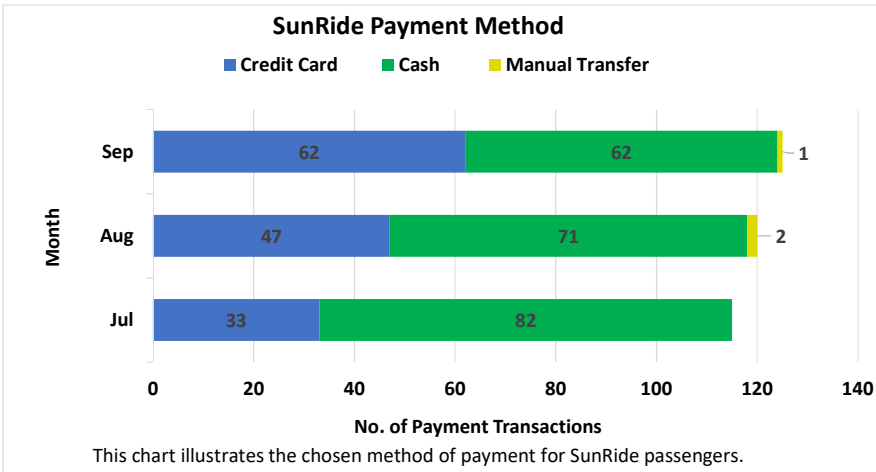
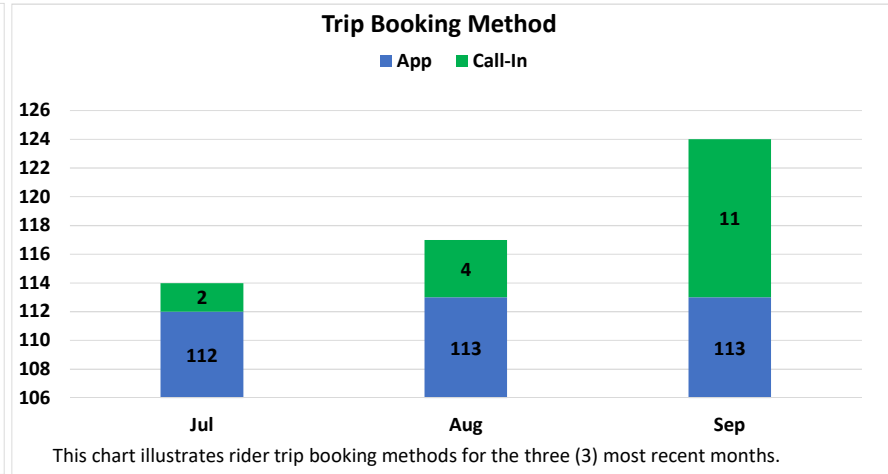
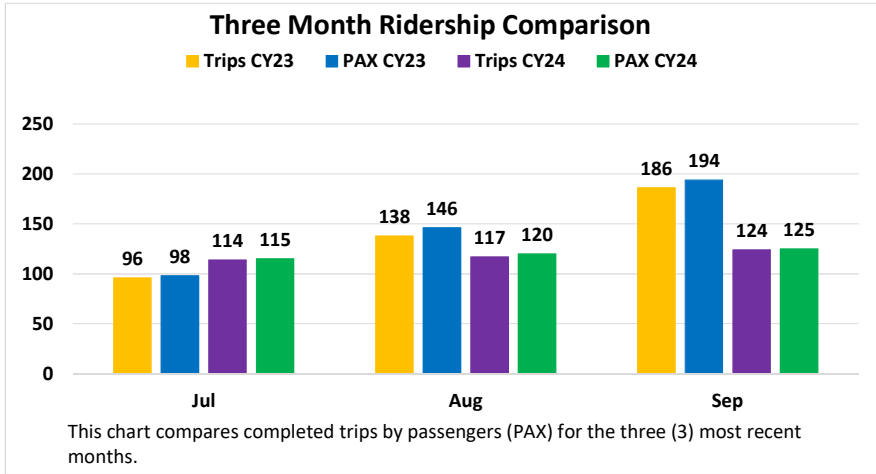


Percentage of Trips System-wide as Ridesharing: 28%.
 [Based on No. of Shared Rides for the month (552) divided by Total Trips Completed (1,976)].

Cathedral City Geo-Fence Metrics CYTD 2024

Total Completed Trips: 1,433

Total Number of Passengers: 1,495



Percentage of Trips as Ridesharing: 12 percent.
 [Based on No. of Shared Rides for the month (15) divided by Total Trips Completed (124).]

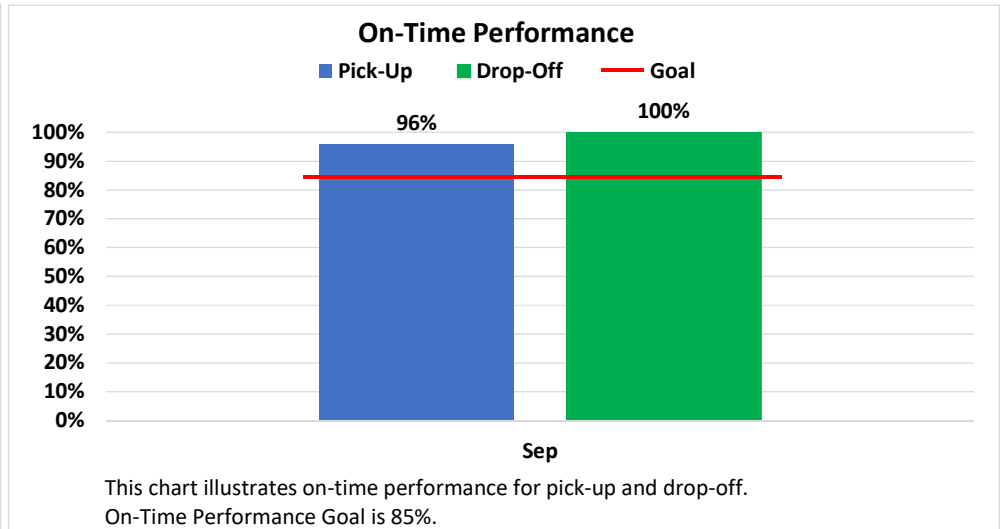
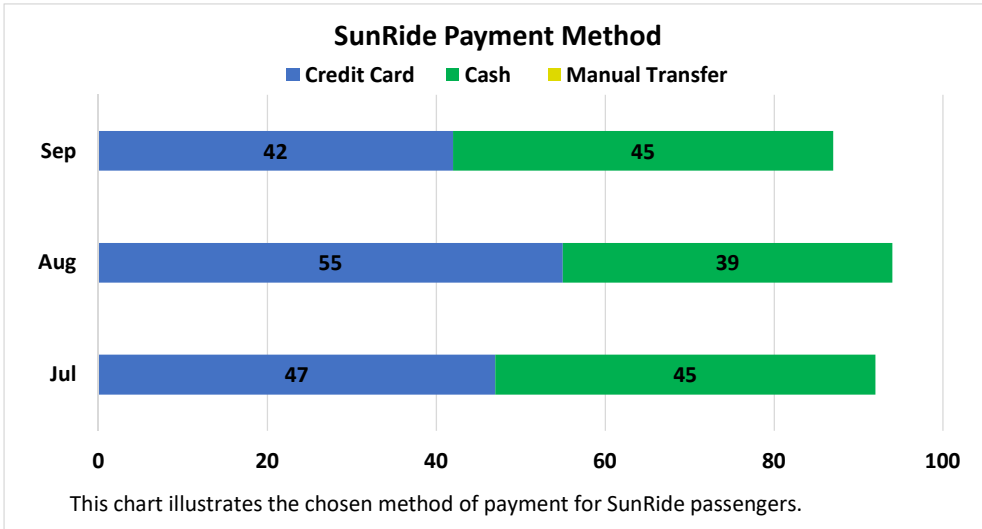
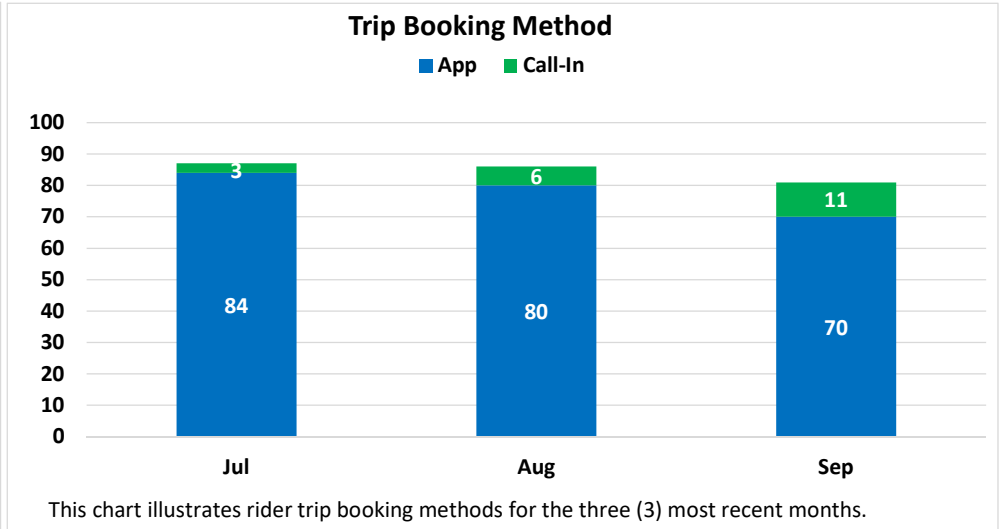
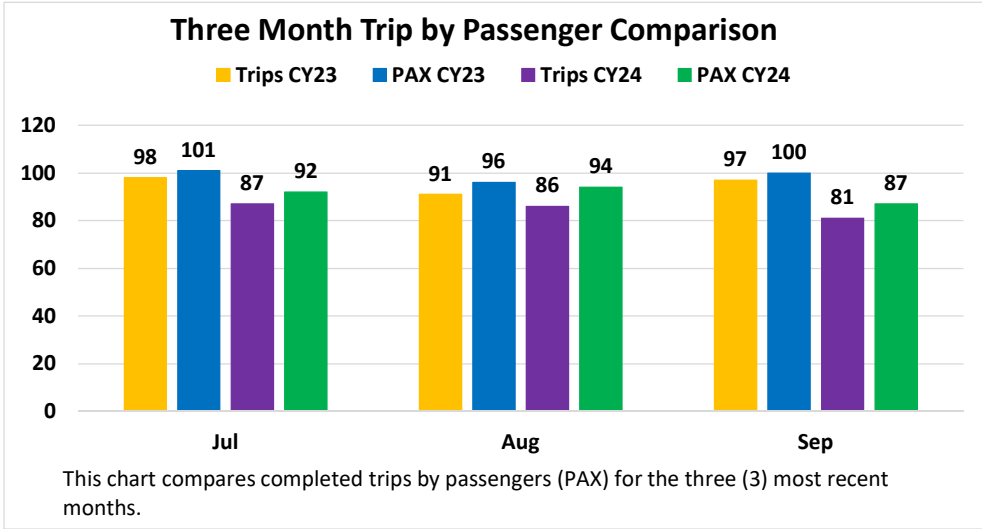
Customer Satisfaction Rating
 Avg. rider trip rating 5.0
 Goal: 4.5

★ ★ ★ ★ ★
EXCEEDS GOAL

Coachella Geo-Fence Metrics CYTD 2024

Total Completed Trips: 932

Total Number of Passengers: 1,035



Combined Zone: Coachella-Indio-LaQuinta
Percentage of Trips as Ridesharing: 23%.
 [Based on No. of Shared Rides for the month (119) divided by Total Trips Completed (516).]

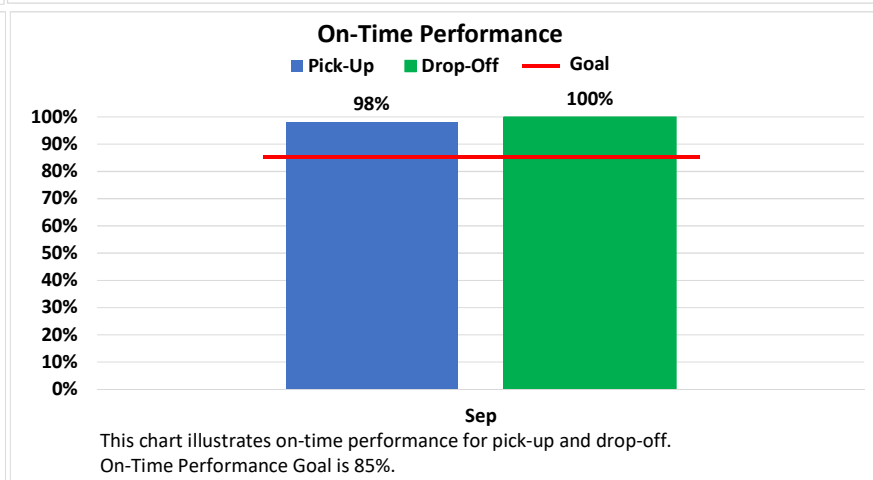
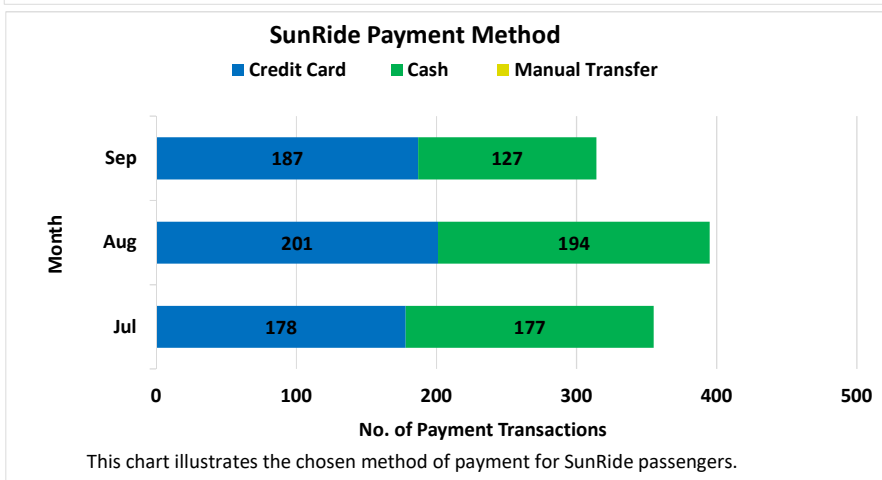
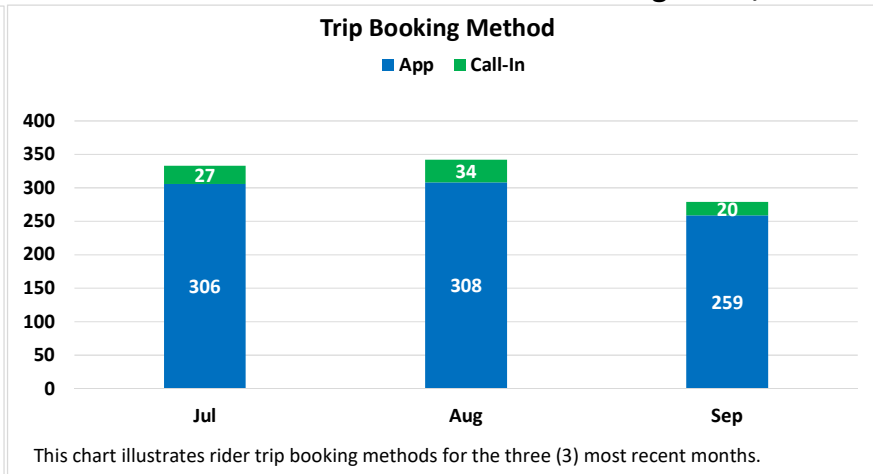
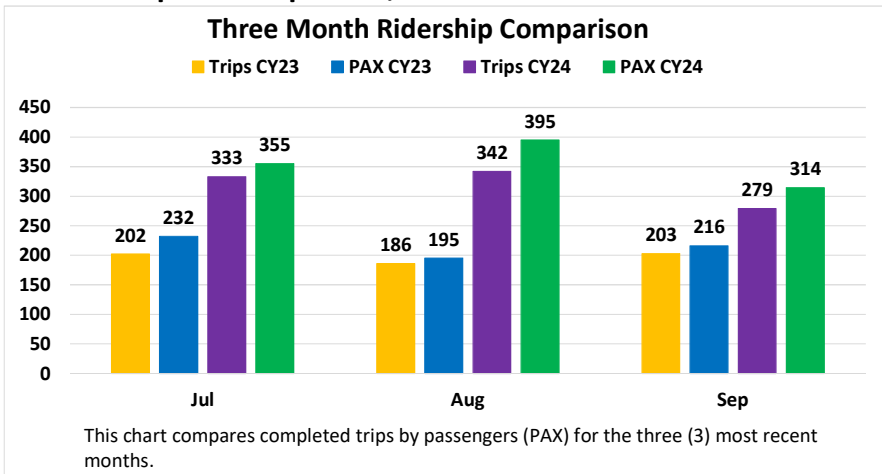
Customer Satisfaction Rating
 Avg. rider trip rating: 4.9
 Goal: 4.5



Desert Hot Springs/Desert Edge Geo-Fence Metrics CYTD 2024

Total Completed Trips: 2,739

Total Number of Passengers: 2,925



Percentage of Trips as Ridesharing: 23%.
 [Based on No. of Shared Rides for the month (63) divided by Total Trips Completed (279).]

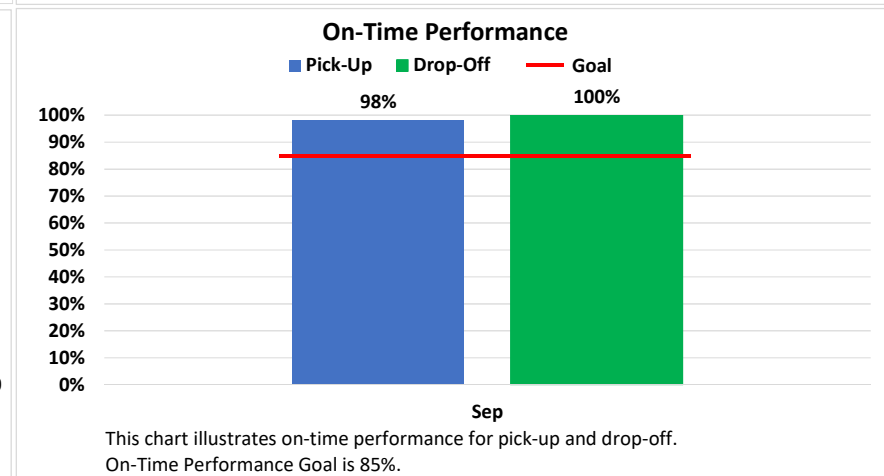
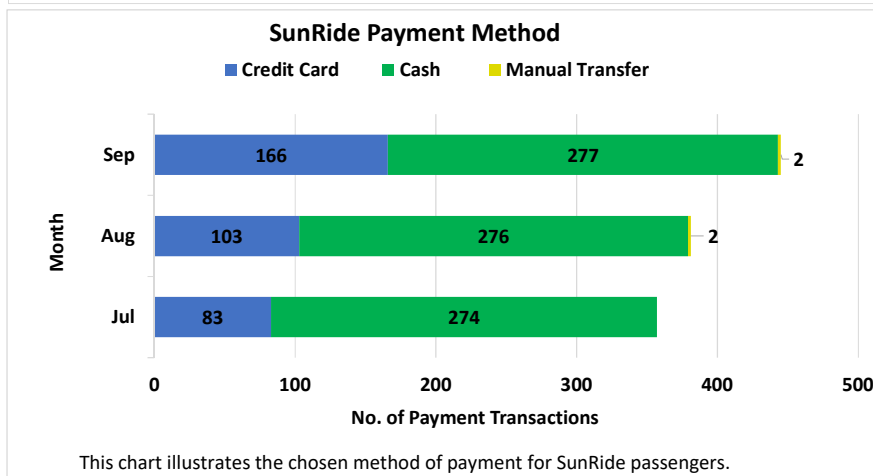
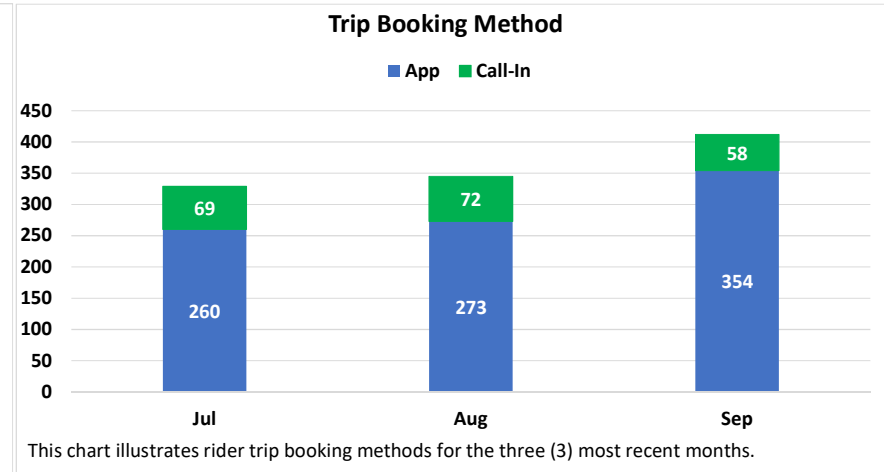
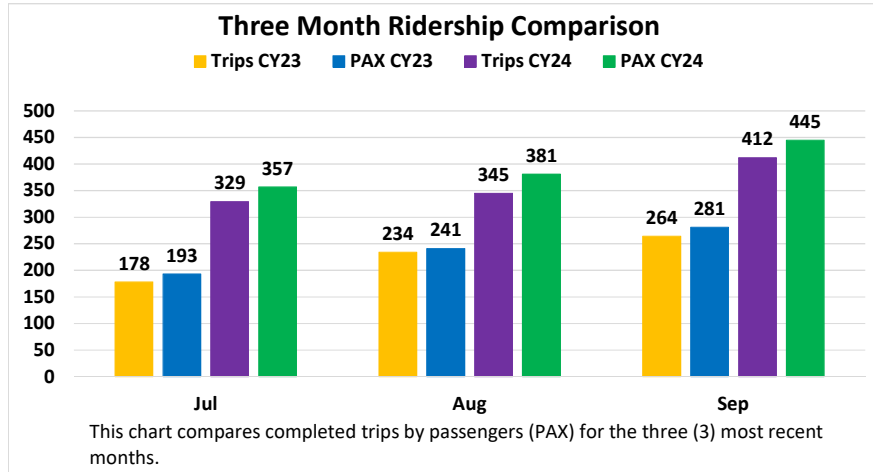
Customer Satisfaction Rating
 Avg. rider trip rating 4.9
 Goal: 4.5



Indio Geo-Fence Metrics CYTD 2024

Total Completed Trips: 2,840

Total Number of Passengers: 3,100



Combined Zone: Coachella-Indio-LaQuinta
Percentage of Trips as Ridesharing: 23%.
 [Based on No. of Shared Rides for the month (119) divided by Total Trips Completed (516).]

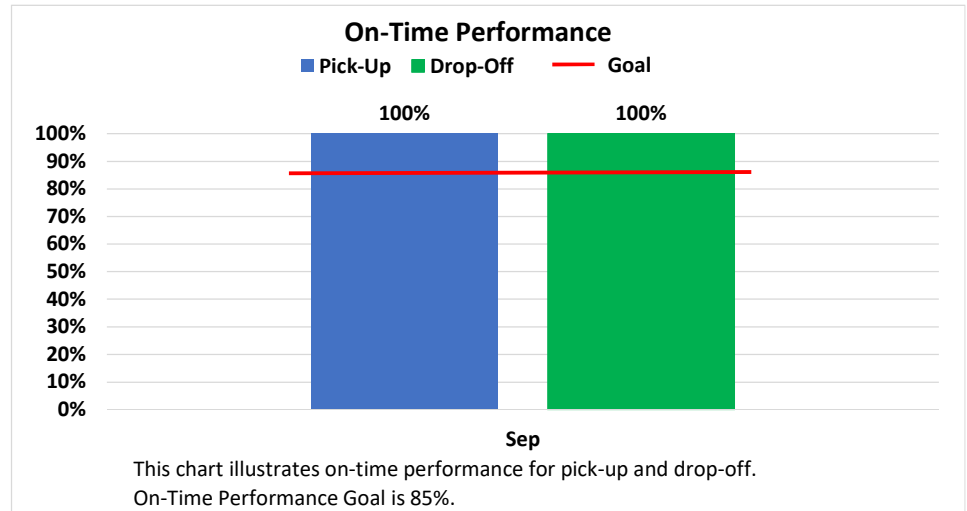
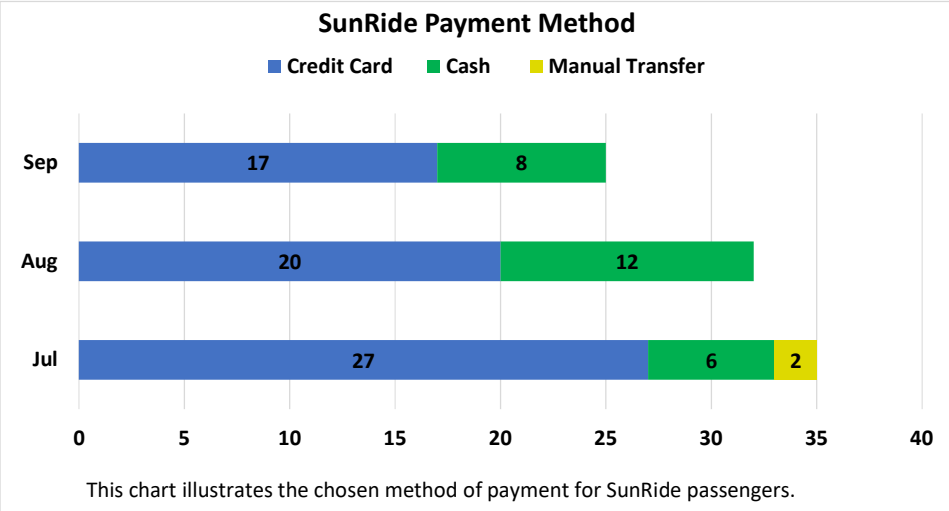
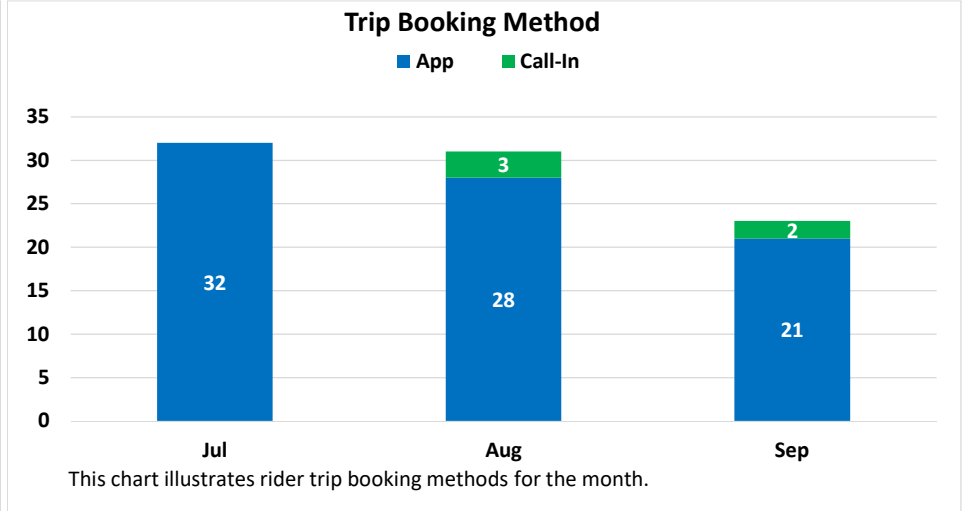
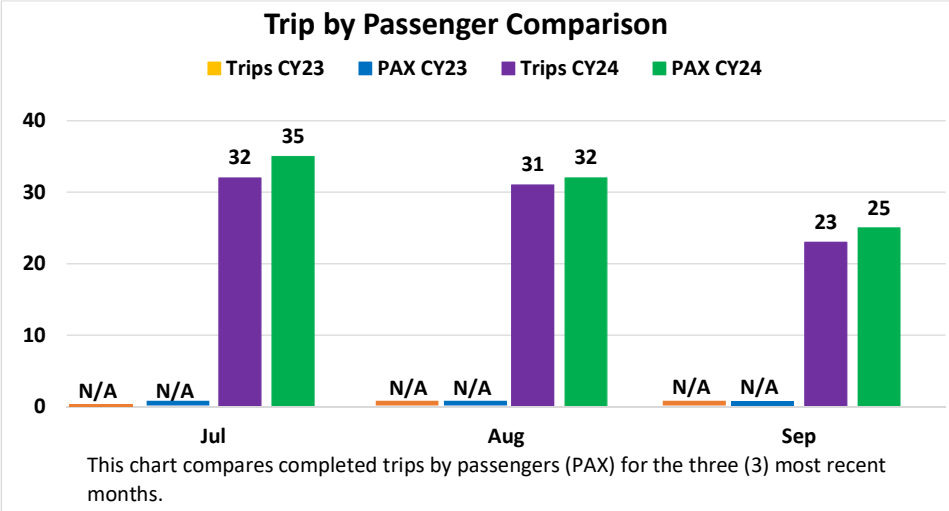
Customer Satisfaction Rating
 Avg. rider trip rating 4.8
 Goal: 4.5



La Quinta Geo-Fence Metrics CYTD 2024

Total Completed Trips: 239

Total Number of Passengers: 263



Combined Zone: Coachella-Indio-LaQuinta

Percentage of Trips as Ridesharing: 23%.

[Based on No. of Shared Rides for the month (119) divided by Total Trips Completed (516).]

Customer Satisfaction Rating

Avg. rider trip rating: 5.0

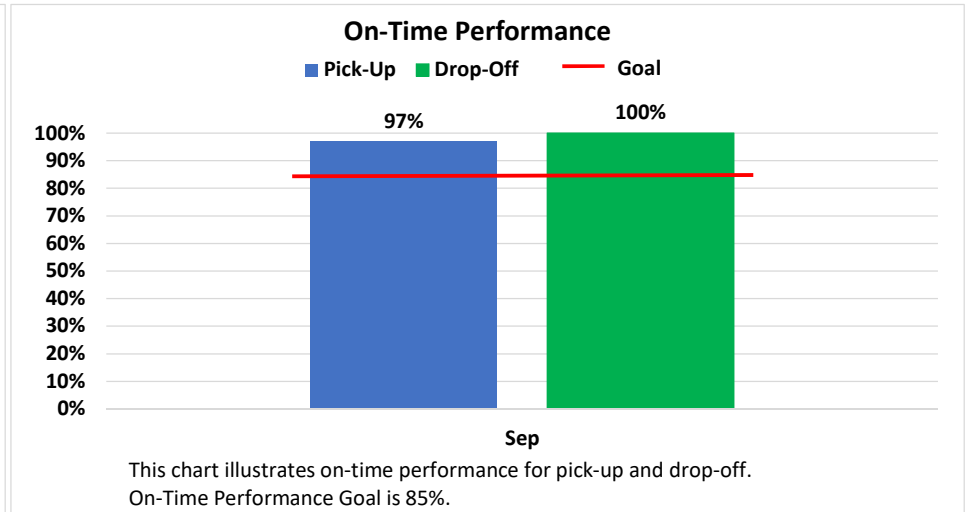
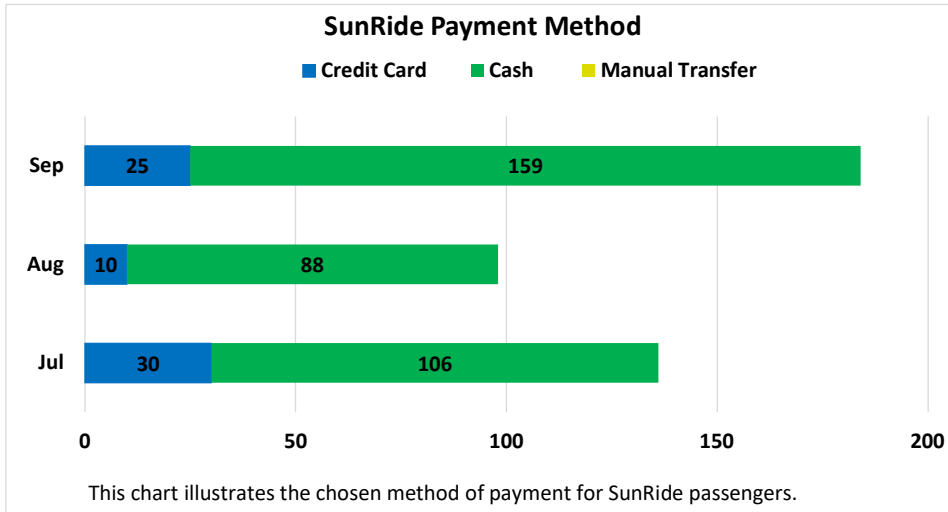
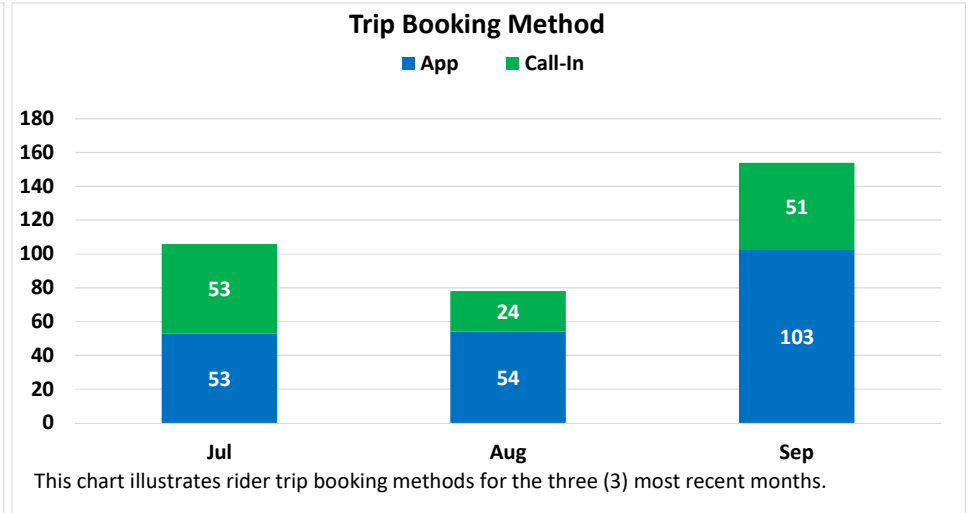
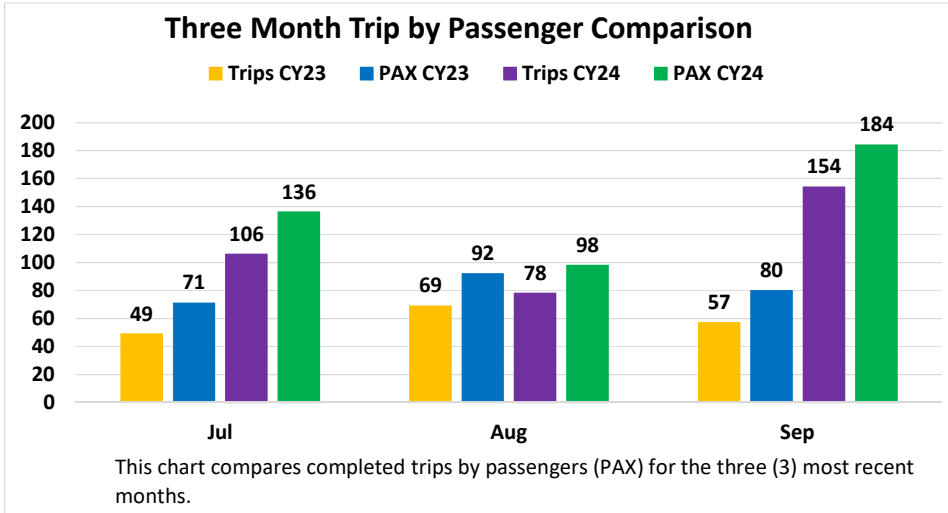
Goal: 4.5



Mecca/North Shore Geo-Fence Metrics CYTD 2024

Total Completed Trips: 853

Total Number of Passengers: 1,067



Percentage of Trips as Ridesharing: 13%.
[Based on No. of Shared Rides for the month (20) divided by Total Trips Completed (154).]

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

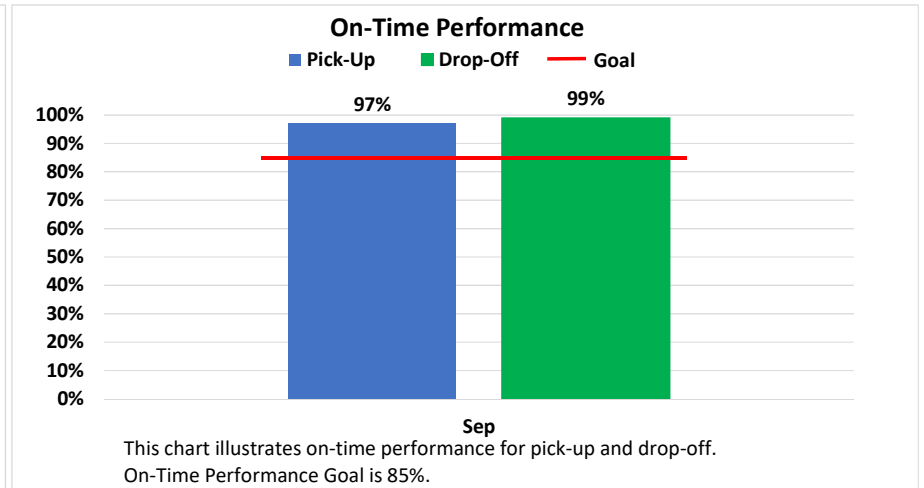
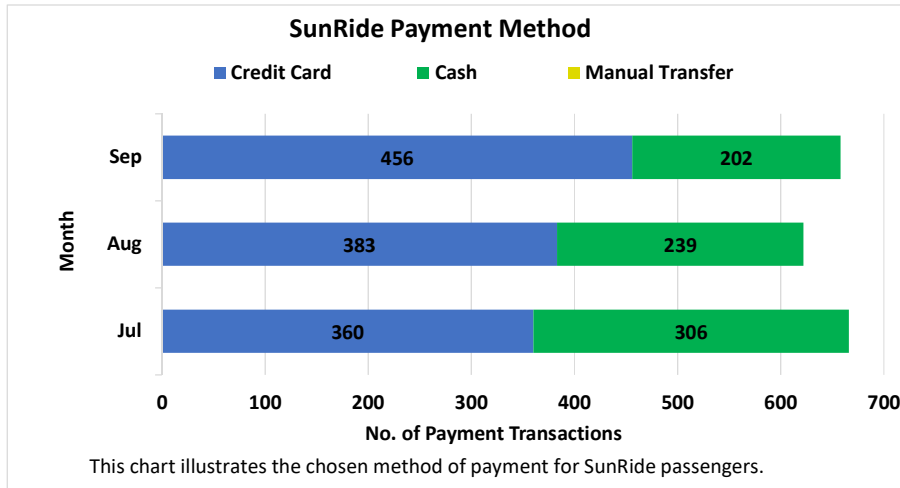
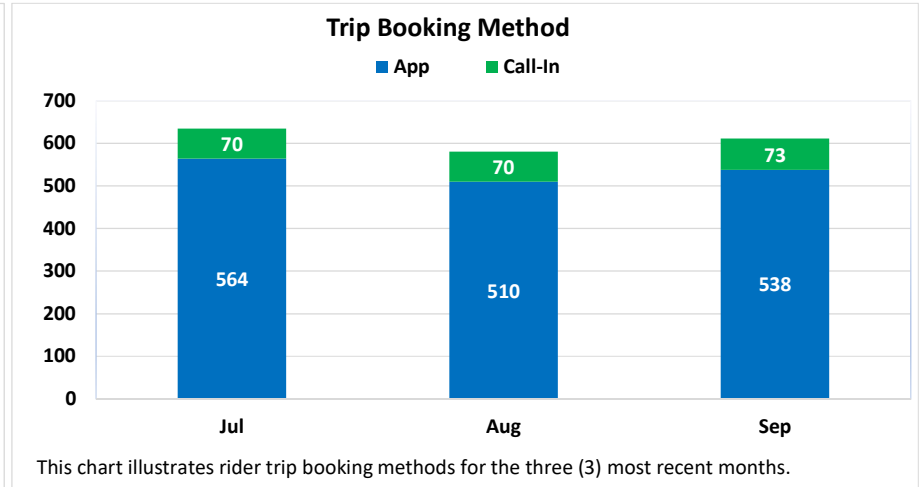
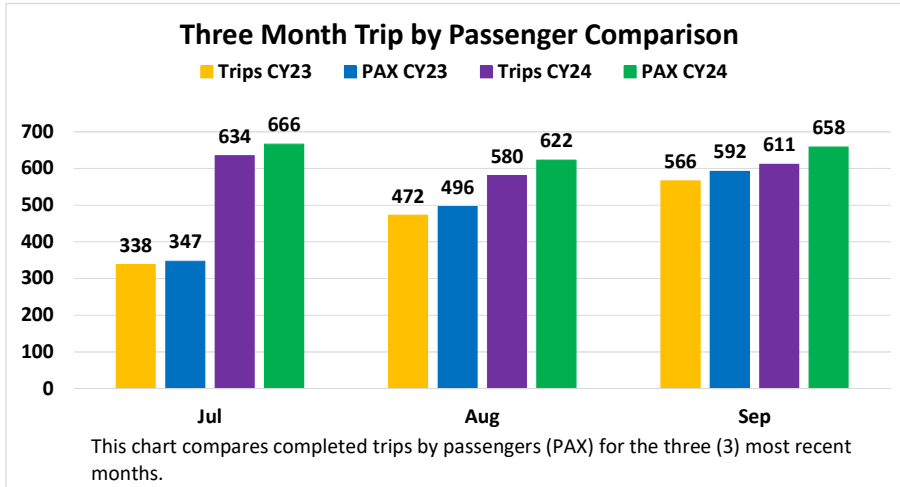


Exceeds Goal

Palm Desert Geo-Fence Metrics CYTD 2024

Total Completed Trips: 5,401

Total Number of Passengers: 5,702



Percentage of Trips as Ridesharing: 40%.
 [Based on No. of Shared Rides for the month (245) divided by Total Trips Completed (611).]

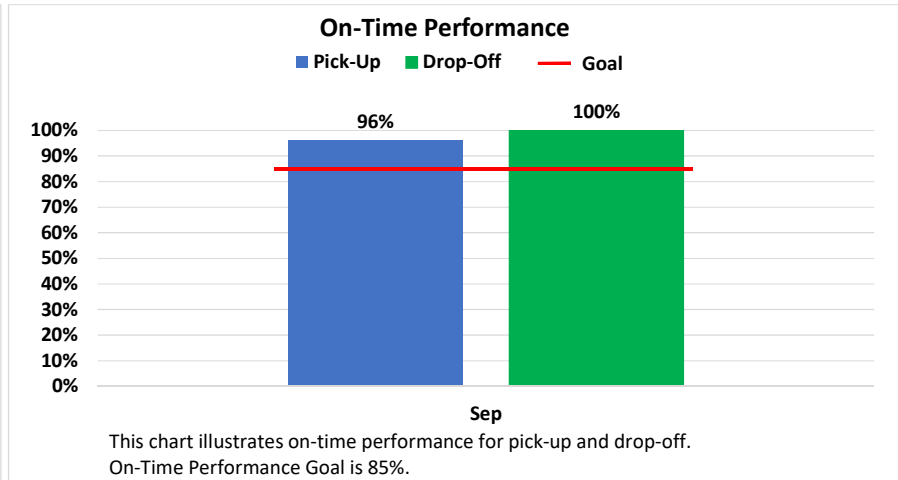
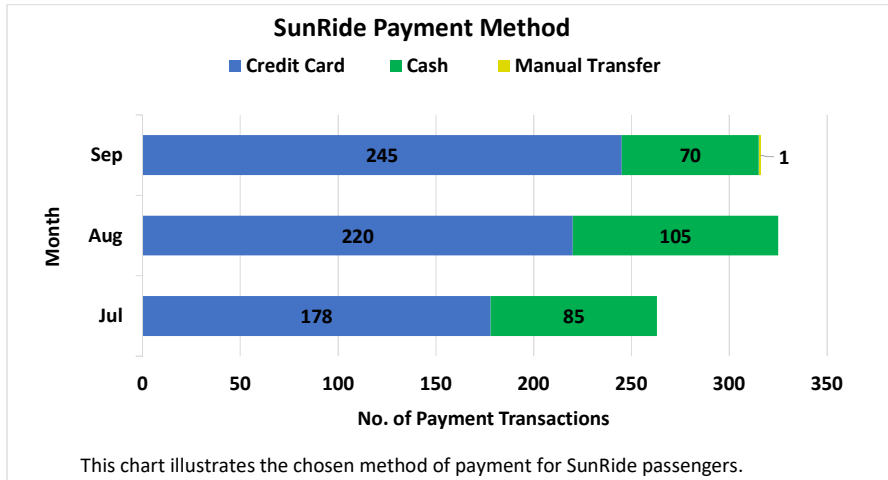
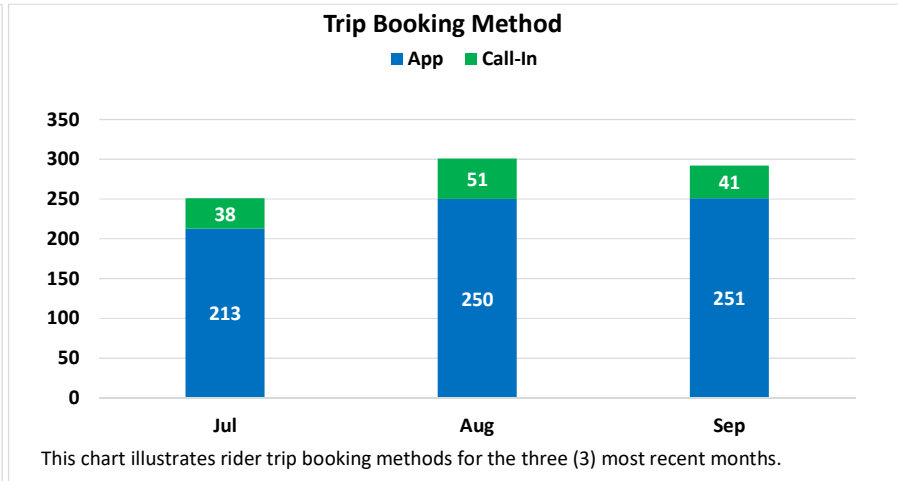
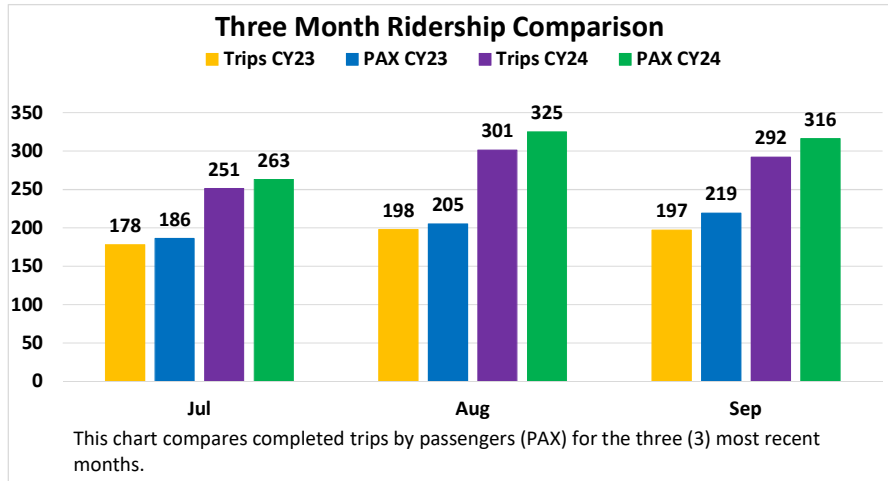
Customer Satisfaction Rating
 Avg. rider trip rating: 5.0
 Goal: 4.5

EXCEEDS GOAL!

Palm Springs Geo-Fence Metrics CYTD 2024

Total Completed Trips: 2,339

Total Number of Passengers: 2,554

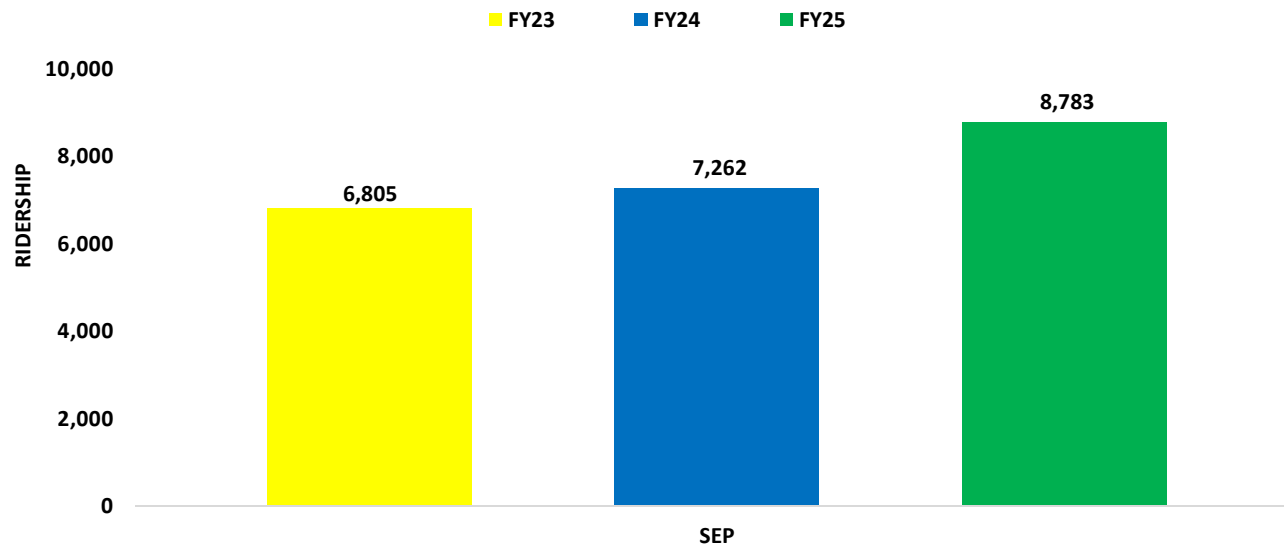


Percentage of Trips as Ridesharing: 31%.
 [Based on No. of Shared Rides for the month (90) divided by Total Trips Completed (292).]

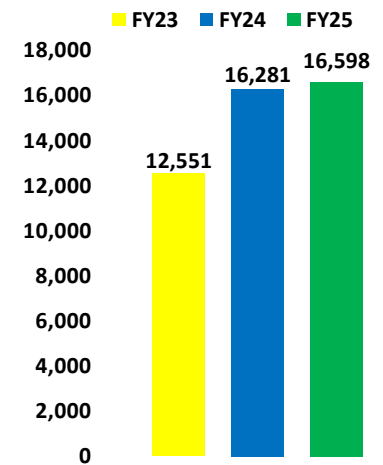
Customer Satisfaction Rating
 Avg. rider trip rating 5.0
 Goal: 4.5



Haul Pass COD Ridership - September 2024

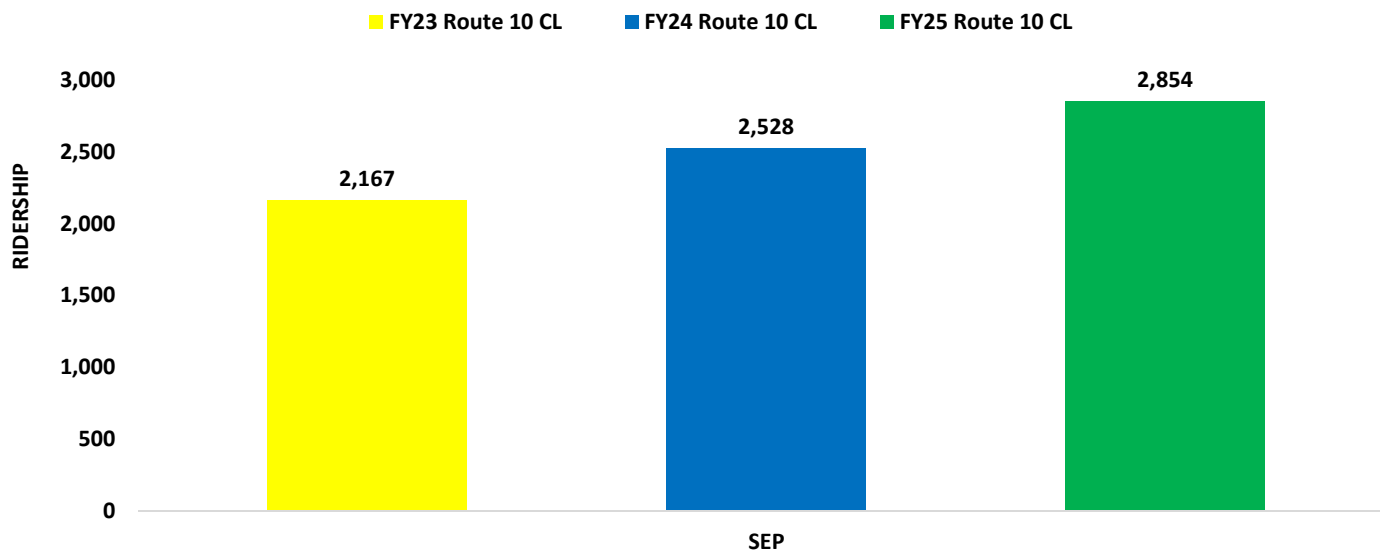


COD Fixed Route Ridership Year to Date

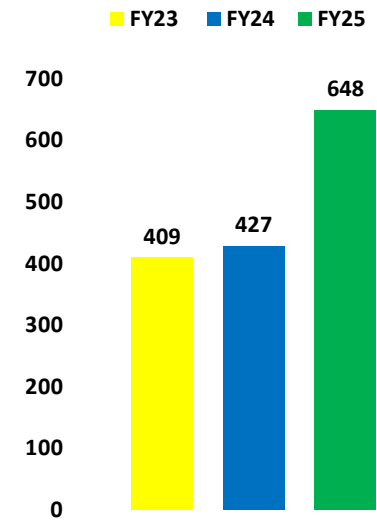


The Haul Pass program was introduced in August 2018.
 This chart represents monthly ridership on the Haul Pass COD.
 For the month of September 2024, Haul Pass COD contributed with 8,783 rides.
 ID Card swipe contributed 639 rides Token Transit contributed 7,938 rides. 31 Day Paper Pass contributed 206 rides.
 COD moved over to Token Transit & 31 Day University Paper Pass as of June 3, 2024.

Haul Pass CSUSB Ridership - September 2024



CSUSB Fixed Route Ridership Total



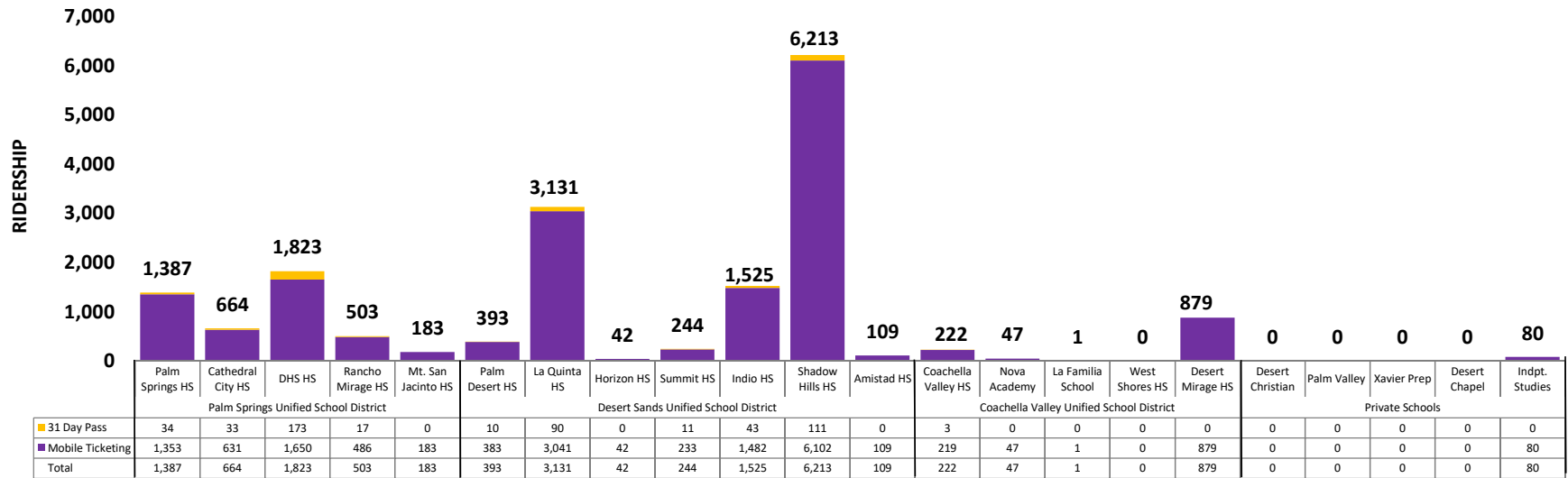
The Haul Pass CSUSB program was introduced in September 2019.

This chart represents monthly ridership on the Haul Pass CSUSB.

For the month of September 2024, CSUSB contributed 3,147 rides from 274 unique users. From that total, 2,854 rides were used on Route 10 and 293 rides on the fixed route system.

High School Haul Pass - September 2024

■ Mobile Ticketing
 ■ 31 Day Pass

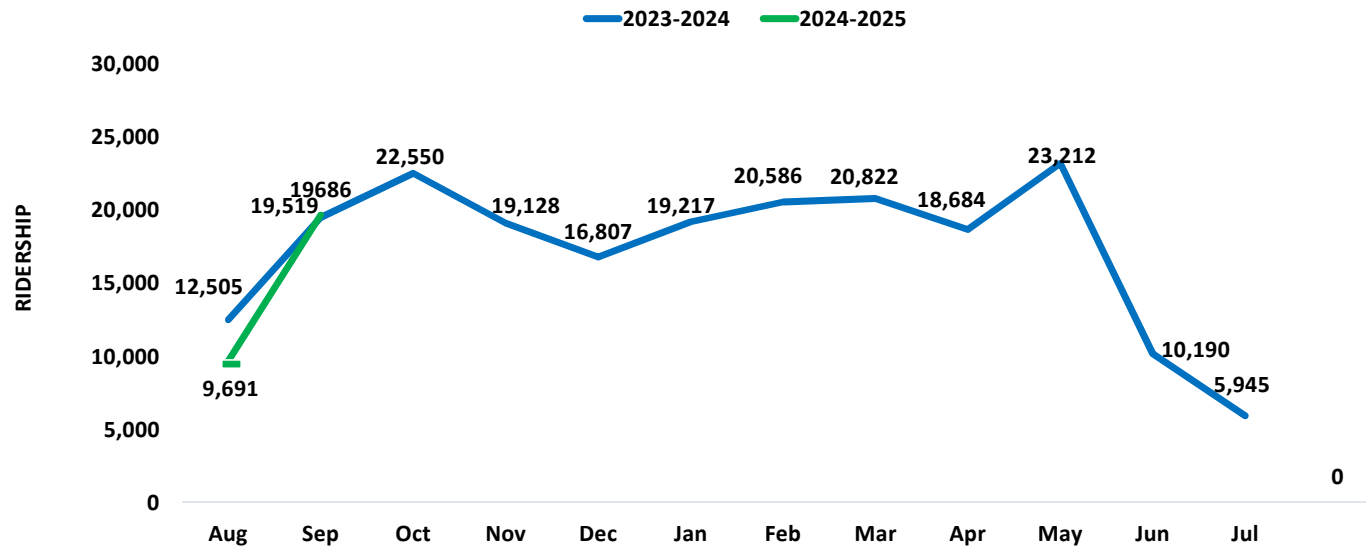


The High School Haul Pass program was introduced in August 2021.

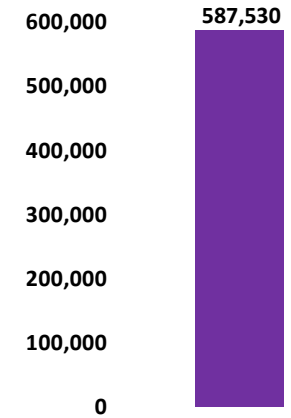
This chart represents a monthly combination of Mobile Ticketing and 31 Day Pass ridership by school for the High School Haul Pass.

The total active users as of September 2024 are 1,009 using the High School Haul Pass.

High School Haul Pass - Year to Date

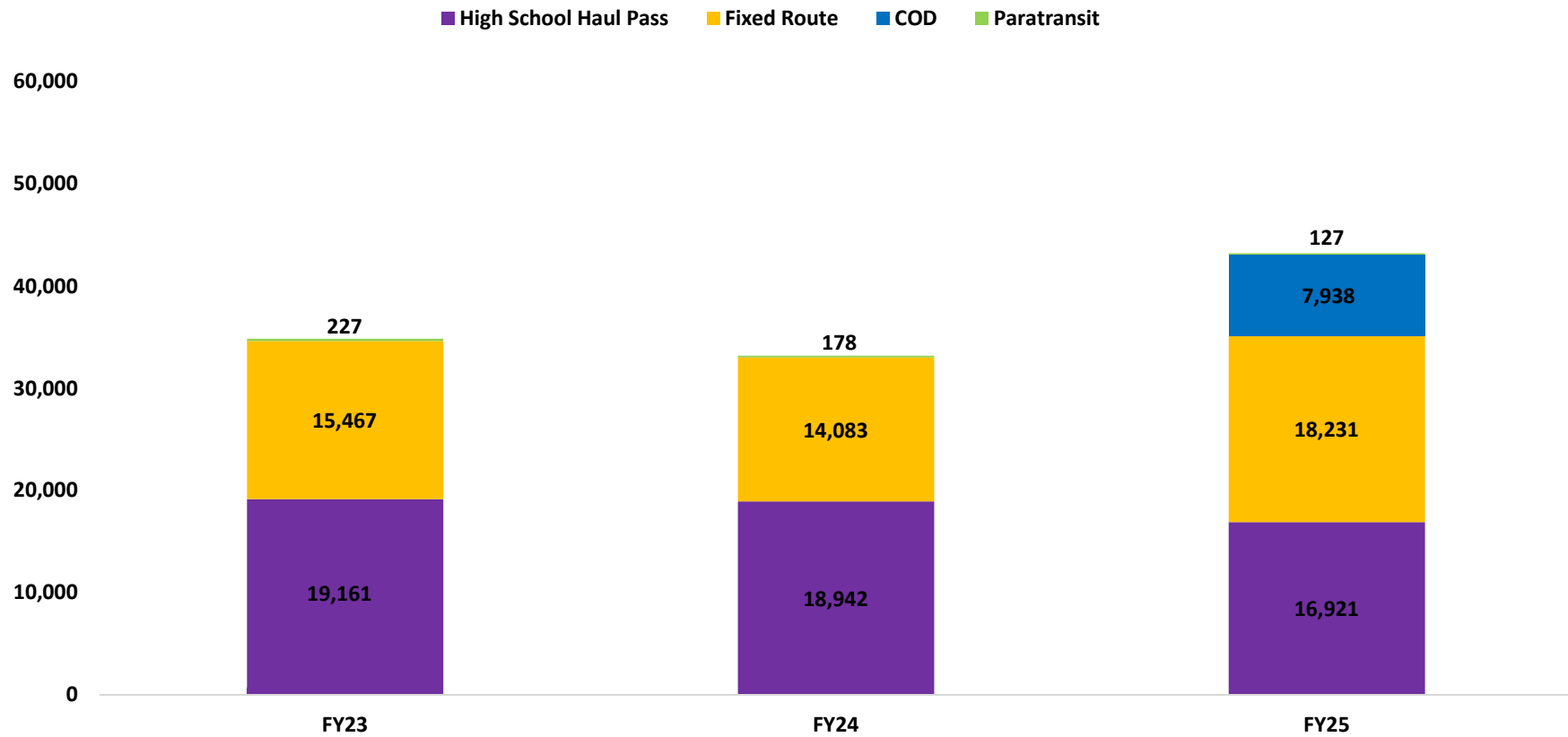


High School Haul Pass Ridership Total



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

Mobile Ticketing Usage - September 2024



This chart represents all monthly mobile ticketing usage by category based on the Token Transit app data. The total for August 2024 includes the following passes used through Token Transit: High School Haul Pass, COD Haul Pass, Fixed Route and Paratransit. A total of 2,571 unique users used mobile ticketing. Unique users made a total of 43,217 rides.

SunLine Transit Agency
CONSENT CALENDAR

DATE: December 4, 2024 **APPROVE**

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Quarterly Performance Summary for Q3 of Calendar Year
2024

Summary:

The following quarterly reports demonstrate the performance of the bargaining and non-bargaining pension plans for the third quarter of calendar year 2024. The report shows market value, asset allocation percentage and performance compared to benchmarks. The bargaining and non-bargaining pension assets were up 5.62% and 5.61%, respectively, for the third quarter of calendar year 2024. Pension plans are measured on long-term performance and it is expected that short-term fluctuations in market performance will exceed or fall short of long-term plan assumptions. The recommended actuarial employer contributions account for the disparity between assumptions.

Recommendation:

Approve.

Asset Allocation & Performance

	Allocation		Performance(%)						
	Market Value (\$)	%	1 Quarter	Year To Date	1 Year	3 Years	5 Years	Since Inception	Inception Date
Total Fund	44,070,205	100.00	5.62	12.10	22.10	4.03	8.35	7.89	07/01/2017
<i>PFM Blended Benchmark</i>			6.11	11.98	22.37	3.98	7.50	7.30	07/01/2017
Domestic Equity	13,535,614	30.71	6.17	20.22	34.73	9.38	N/A	10.22	04/01/2021
<i>Russell 3000 Index</i>			6.23	20.63	35.19	10.29	15.26	11.21	04/01/2021
Vanguard Total Stock Market ETF	13,535,614	30.71	6.17	20.59	35.25	10.12	15.18	20.92	04/01/2020
<i>Russell 3000 Index</i>			6.23	20.63	35.19	10.29	15.26	21.00	04/01/2020
International Equity	8,020,148	18.20	6.87	12.77	24.55	0.87	N/A	1.33	04/01/2021
<i>MSCI AC World ex USA (Net)</i>			8.06	14.21	25.35	4.14	7.59	4.22	04/01/2021
Vanguard Total International Stock ETF	4,806,103	10.91	8.03	13.59	24.92	4.04	7.79	13.42	04/01/2020
<i>MSCI AC World ex USA (Net)</i>			8.06	14.21	25.35	4.14	7.59	12.90	04/01/2020
J. O. Hambro International Select	530,531	1.20	4.79	8.58	20.10	-2.66	5.74	5.52	07/01/2017
<i>MSCI AC World ex USA (Net)</i>			8.06	14.21	25.35	4.14	7.59	6.12	07/01/2017
Harding Loevner International Equity	529,775	1.20	9.45	11.18	24.67	2.19	7.96	8.18	07/01/2020
<i>MSCI AC World ex USA (Net)</i>			8.06	14.21	25.35	4.14	7.59	9.78	07/01/2020
Goldman Sachs GQG Ptnrs Intl Opportunities	804,151	1.82	0.26	17.31	32.01	9.20	12.20	26.51	09/01/2023
<i>MSCI AC World ex USA (Net)</i>			8.06	14.21	25.35	4.14	7.59	19.60	09/01/2023
Vanguard FTSE Developed Markets ETF	986,596	2.24	7.46	12.20	24.73	4.83	8.31	7.12	03/01/2022
<i>MSCI EAFE (net)</i>			7.26	12.99	24.77	5.48	8.20	8.09	03/01/2022
Hartford Schroders Emerging Markets Equity	362,991	0.82	5.21	14.90	24.37	-1.82	5.02	2.18	03/01/2018
<i>MSCI EM (net)</i>			8.72	16.86	26.05	0.40	5.75	2.25	03/01/2018
Other Growth	2,095,727	4.76	-1.28	9.32	13.73	12.62	N/A	15.30	04/01/2021
NB Secondary Opportunities Fund V Offshore[CE]	2,095,727	4.76	-1.28	9.32	13.73	99.08	N/A	46.31	03/01/2022
<i>CA US Private Equity Index</i>			0.00	1.75	4.77	3.86	13.80	2.28	03/01/2022

Returns are net of mutual fund fees.

Returns are expressed as percentages.

*Asset class level returns may vary from individual underlying manager returns due to cash flows

Asset Allocation & Performance

	Allocation		Performance(%)						
	Market Value (\$)	%	1 Quarter	Year To Date	1 Year	3 Years	5 Years	Since Inception	Inception Date
Fixed Income	16,966,364	38.50	5.23	5.52	12.87	-0.59	0.95	2.06	07/01/2017
<i>Blmbg. U.S. Aggregate</i>			5.20	4.45	11.57	-1.39	0.33	1.54	07/01/2017
Baird Core Plus	4,783,655	10.85	5.22	5.35	12.85	-0.67	1.21	2.26	07/01/2017
<i>Blmbg. U.S. Aggregate</i>			5.20	4.45	11.57	-1.39	0.33	1.54	07/01/2017
DoubleLine Core Fixed Income	1,847,240	4.19	5.64	5.73	12.60	-0.69	0.72	1.57	09/01/2017
PGIM Total Return Bond Fund	3,843,456	8.72	5.21	5.85	13.43	-0.87	0.82	2.06	09/01/2017
<i>Blmbg. U.S. Aggregate</i>			5.20	4.45	11.57	-1.39	0.33	1.39	09/01/2017
Voya Intermediate Bond	1,864,838	4.23	5.25	5.87	13.40	-0.94	0.88	0.88	01/01/2020
<i>Blmbg. U.S. Aggregate</i>			5.20	4.45	11.57	-1.39	0.33	0.31	01/01/2020
iShares Core US Aggregate Bond ETF	3,138,661	7.12	5.21	4.56	11.55	-1.39	0.31	4.10	02/01/2023
<i>Blmbg. U.S. Aggregate</i>			5.20	4.45	11.57	-1.39	0.33	4.10	02/01/2023
iShares Intermediate-Term Corporate Bond ETF	786,300	1.78	5.92	6.50	15.12	-0.22	1.76	1.76	10/01/2019
<i>ICE BofA U.S. Corporate 5-10 Year Index</i>			5.89	6.50	15.08	-0.28	1.80	1.80	10/01/2019
NYLI MacKay High Yield Corp Bond Fund	702,215	1.59	3.70	6.94	13.16	3.45	4.67	3.76	06/01/2021
<i>ICE BofA US High Yield Index</i>			5.28	8.03	15.66	3.08	4.55	3.48	06/01/2021
Other Income	2,074,103	4.71	0.00	5.08	8.12	0.36	N/A	-0.07	09/01/2021
Golub Capital Partners International XIV[CE]	1,620,000	3.68	0.00	5.25	8.60	N/A	N/A	10.37	04/01/2023
<i>Cliffwater Direct Lending Index</i>			0.00	5.92	9.04	8.92	8.88	10.18	04/01/2023
ATEL Private Debt Partners II[CE]	454,103	1.03	0.00	4.51	6.46	6.62	N/A	6.62	10/01/2021
<i>Cliffwater Direct Lending Index</i>			0.00	5.92	9.04	8.92	8.88	8.92	10/01/2021
Cash Equivalent	1,378,249	3.13	1.31	3.95	5.32	3.42	2.20	2.05	07/01/2017
First American Prime Obligation - Z	1,378,249	3.13	1.31	3.99	5.40	3.57	2.33	2.21	07/01/2017

*[Current Estimate] At any point in time the valuation for private equity and other illiquid asset classes may be different from market prices due to an inherent lag effect in the industry. The reporting lag inherent in this process means that there can be a valuation lag of a quarter or, in some cases, even longer. For such illiquid asset classes shown herein, performance is calculated for the relevant period(s) using a roll-forward valuation approach whereby the last reported valuation is adjusted for cash flows to provide an initial estimated valuation, typically resulting in a zero return for the lagging period. Performance is adjusted and finalized when the updated valuation is reported. Returns are gross of management fees. The roll-forward valuation methodology described is consistent with guidance provided within the CFA Institute's Global Investment Performance Standards (GIPS). Performance is calculated using the Modified-Dietz time weighted methodology to maintain consistency with the other returns in this exhibit. For since inception IRR performance, please refer to the fund-specific overview page.

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Returns are expressed as percentages.

*Asset class level returns may vary from individual underlying manager returns due to cash flows

Asset Allocation & Performance

	Allocation		Performance(%)						
	Market Value (\$)	%	1 Quarter	Year To Date	1 Year	3 Years	5 Years	Since Inception	Inception Date
Total Fund - Non-Bargaining	44,115,490	100.00	5.61	12.08	22.08	4.03	8.35	7.89	07/01/2017
<i>PFM Blended Benchmark</i>			<i>6.11</i>	<i>11.98</i>	<i>22.37</i>	<i>3.98</i>	<i>7.50</i>	<i>7.30</i>	<i>07/01/2017</i>
Domestic Equity	13,396,016	30.37	6.17	20.22	34.73	9.38	N/A	10.22	04/01/2021
<i>Russell 3000 Index</i>			<i>6.23</i>	<i>20.63</i>	<i>35.19</i>	<i>10.29</i>	<i>15.26</i>	<i>11.21</i>	<i>04/01/2021</i>
Vanguard Total Stock Market ETF	13,396,016	30.37	6.17	20.59	35.25	10.12	15.18	20.92	04/01/2020
<i>Russell 3000 Index</i>			<i>6.23</i>	<i>20.63</i>	<i>35.19</i>	<i>10.29</i>	<i>15.26</i>	<i>21.00</i>	<i>04/01/2020</i>
International Equity	7,996,147	18.13	6.87	12.77	24.54	0.87	N/A	1.33	04/01/2021
<i>MSCI AC World ex USA (Net)</i>			<i>8.06</i>	<i>14.21</i>	<i>25.35</i>	<i>4.14</i>	<i>7.59</i>	<i>4.22</i>	<i>04/01/2021</i>
Vanguard Total International Stock ETF	4,787,847	10.85	8.03	13.59	24.92	4.04	7.79	13.42	04/01/2020
<i>MSCI AC World ex USA (Net)</i>			<i>8.06</i>	<i>14.21</i>	<i>25.35</i>	<i>4.14</i>	<i>7.59</i>	<i>12.90</i>	<i>04/01/2020</i>
J. O. Hambro International Select	529,111	1.20	4.79	8.58	20.10	-2.66	5.74	5.52	07/01/2017
<i>MSCI AC World ex USA (Net)</i>			<i>8.06</i>	<i>14.21</i>	<i>25.35</i>	<i>4.14</i>	<i>7.59</i>	<i>6.12</i>	<i>07/01/2017</i>
Harding Loevner International Equity	528,895	1.20	9.45	11.18	24.67	2.19	7.96	8.18	07/01/2020
<i>MSCI AC World ex USA (Net)</i>			<i>8.06</i>	<i>14.21</i>	<i>25.35</i>	<i>4.14</i>	<i>7.59</i>	<i>9.78</i>	<i>07/01/2020</i>
Goldman Sachs GQG Ptnrs Intl Opportunities	802,850	1.82	0.26	17.31	32.01	9.20	12.20	26.51	09/01/2023
<i>MSCI AC World ex USA (Net)</i>			<i>8.06</i>	<i>14.21</i>	<i>25.35</i>	<i>4.14</i>	<i>7.59</i>	<i>19.60</i>	<i>09/01/2023</i>
Vanguard FTSE Developed Markets ETF	985,118	2.23	7.46	12.20	24.73	4.83	8.31	7.12	03/01/2022
<i>MSCI EAFE (net)</i>			<i>7.26</i>	<i>12.99</i>	<i>24.77</i>	<i>5.48</i>	<i>8.20</i>	<i>8.09</i>	<i>03/01/2022</i>
Hartford Schroders Emerging Markets Equity	362,326	0.82	5.21	14.90	24.37	-1.82	5.02	2.18	03/01/2018
<i>MSCI EM (net)</i>			<i>8.72</i>	<i>16.86</i>	<i>26.05</i>	<i>0.40</i>	<i>5.75</i>	<i>2.25</i>	<i>03/01/2018</i>
Other Growth	2,095,727	4.75	-1.28	9.32	13.73	12.62	N/A	15.30	04/01/2021
NB Secondary Opportunities Fund V Offshore[CE]	2,095,727	4.75	-1.28	9.32	13.73	99.08	N/A	46.31	03/01/2022
<i>CA US Private Equity Index</i>			<i>0.00</i>	<i>1.75</i>	<i>4.77</i>	<i>3.86</i>	<i>13.80</i>	<i>2.28</i>	<i>03/01/2022</i>

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Returns are expressed as percentages.

*Asset class level returns may vary from individual underlying manager returns due to cash flows

Asset Allocation & Performance

	Allocation		Performance(%)						
	Market Value (\$)	%	1 Quarter	Year To Date	1 Year	3 Years	5 Years	Since Inception	Inception Date
Fixed Income	17,038,113	38.62	5.23	5.52	12.87	-0.60	0.95	2.05	07/01/2017
<i>Blmbg. U.S. Aggregate</i>			5.20	4.45	11.57	-1.39	0.33	1.54	07/01/2017
Baird Core Plus	4,826,891	10.94	5.22	5.35	12.85	-0.67	1.21	2.26	07/01/2017
<i>Blmbg. U.S. Aggregate</i>			5.20	4.45	11.57	-1.39	0.33	1.54	07/01/2017
DoubleLine Core Fixed Income	1,842,725	4.18	5.64	5.73	12.60	-0.69	0.72	1.57	09/01/2017
PGIM Total Return Bond Fund	3,888,702	8.81	5.21	5.85	13.43	-0.87	0.82	2.06	09/01/2017
<i>Blmbg. U.S. Aggregate</i>			5.20	4.45	11.57	-1.39	0.33	1.39	09/01/2017
Voya Intermediate Bond	1,860,138	4.22	5.25	5.87	13.40	-0.94	0.88	0.88	01/01/2020
<i>Blmbg. U.S. Aggregate</i>			5.20	4.45	11.57	-1.39	0.33	0.31	01/01/2020
iShares Core US Aggregate Bond ETF	3,131,066	7.10	5.21	4.56	11.55	-1.39	0.31	4.10	02/01/2023
<i>Blmbg. U.S. Aggregate</i>			5.20	4.45	11.57	-1.39	0.33	4.10	02/01/2023
iShares Intermediate-Term Corporate Bond ETF	788,234	1.79	5.92	6.50	15.12	-0.22	1.76	1.76	10/01/2019
<i>ICE BofA U.S. Corporate 5-10 Year Index</i>			5.89	6.50	15.08	-0.28	1.80	1.80	10/01/2019
NYLI MacKay High Yield Corp Bond Fund	700,358	1.59	3.70	6.94	13.16	3.45	4.67	3.76	06/01/2021
<i>ICE BofA US High Yield Index</i>			5.28	8.03	15.66	3.08	4.55	3.48	06/01/2021
Other Income	2,074,103	4.70	0.00	5.08	8.12	0.35	N/A	-0.08	09/01/2021
Golub Capital Partners International XIV[CE]	1,620,000	3.67	0.00	5.25	8.60	N/A	N/A	10.37	04/01/2023
<i>Cliffwater Direct Lending Index</i>			0.00	5.92	9.04	8.92	8.88	10.18	04/01/2023
ATEL Private Debt Partners II[CE]	454,103	1.03	0.00	4.51	6.46	6.64	N/A	6.64	10/01/2021
<i>Cliffwater Direct Lending Index</i>			0.00	5.92	9.04	8.92	8.88	8.92	10/01/2021
Cash Equivalent	1,515,384	3.44	1.31	3.96	5.33	3.47	2.23	2.06	07/01/2017
First American Prime Obligation - Z	1,515,384	3.44	1.31	3.99	5.40	3.57	2.33	2.21	07/01/2017

*[Current Estimate] At any point in time the valuation for private equity and other illiquid asset classes may be different from market prices due to an inherent lag effect in the industry. The reporting lag inherent in this process means that there can be a valuation lag of a quarter or, in some cases, even longer. For such illiquid asset classes shown herein, performance is calculated for the relevant period(s) using a roll-forward valuation approach whereby the last reported valuation is adjusted for cash flows to provide an initial estimated valuation, typically resulting in a zero return for the lagging period. Performance is adjusted and finalized when the updated valuation is reported. Returns are gross of management fees. The roll-forward valuation methodology described is consistent with guidance provided within the CFA Institute's Global Investment Performance Standards (GIPS). Performance is calculated using the Modified-Dietz time weighted methodology to maintain consistency with the other returns in this exhibit. For since inception IRR performance, please refer to the fund-specific overview page.

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SunLine Transit Agency

CONSENT CALENDAR

DATE: December 4, 2024

APPROVE

TO: Finance/Audit Committee
Board of Directors

RE: Acceptance of Board Member Attendance for October 2024

Summary:

The attached report summarizes the Board of Directors' attendance for fiscal year to date October 2024.

Recommendation:

Approve.

FY 24/25	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									10	3
Palm Desert	X		X	X									10	3
Palm Springs	X		X	X									10	3
Cathedral City	X		X	X									10	3
Rancho Mirage	X		X	X									10	3
Indian Wells	X			X									10	2
La Quinta	X		X	X									10	3
Indio	X		X	X									10	3
Coachella	X		X	X									10	3
County of Riverside	X		X	X									10	3

X - ATTENDED (Primary/Alternate)

DARK –

SunLine Transit Agency

CONSENT CALENDAR

DATE: December 4, 2024

APPROVE

TO: Board of Directors

RE: Approval of Joint Board Meeting Minutes for October 23, 2024

Summary:

The attached report summarizes the Joint Board Meeting Minutes from the Board of Directors' meeting held on October 23, 2024.

Recommendation:

Approve.

MINUTES

Joint SunLine Transit Agency/SunLine Services Group Board of Directors Meeting October 23, 2024

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, October 23, 2024 in the Board Room at SunLine Transit Agency, 32-505 Harry Oliver Trail, Thousand Palms, CA 92276.

1. CALL TO ORDER

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

2. FLAG SALUTE

Board Member Miller led the pledge of allegiance.

3. ROLL CALL

Members Present:

Nancy Ross, Chair, SunLine Agency Board Member, City of Cathedral City
Lynn Mallotto, Vice-Chair, SunLine Agency Board Member, City of Rancho Mirage

Russell Betts, SunLine Agency Board Member, City of Desert Hot Springs

Ty Peabody, SunLine Agency Board Member, City of Indian Wells

Lisa Middleton, SunLine Agency Board Member, City of Palm Springs

Kathleen Kelly, SunLine Agency Board Member, City of Palm Desert

John Peña, SunLine Agency Board Member, City of La Quinta

Denise Delgado, SunLine Agency Board Member, City of Coachella

Glenn Miller, SunLine Agency Board Member, City of Indio

Supervisor V. Manuel Perez, SunLine Agency Board Member, County of Riverside*

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

4. FINALIZATION OF AGENDA

No changes to the agenda.

**Supervisor Perez joined the meeting at 12:03 p.m.*

**SUNLINE TRANSIT AGENCY/
SUNLINE SERVICES GROUP
BOARD OF DIRECTORS MEETING - MINUTES
OCTOBER 23, 2024**

5. PUBLIC COMMENTS

None.

6. PRESENTATIONS

a) Ophelia Girls Project

A presentation was provided by Peter Sturgeon, President/CEO of the John F. Kennedy Memorial Foundation on the partnership between SunLine Transit Agency and the Ophelia Girls Project.

Comments were made by:

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

7. BOARD MEMBER COMMENTS

None.

8. CONSENT CALENDAR

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

9. APPROVAL OF BOARD MEETING DATES FOR CALENDAR YEAR 2025

Board Operations Committee Chair Miller reported that this item was brought to the committee and they unanimously approved the item. SunLine Transit Agency Board Member Miller moved to approve the Approval of Board Meeting Dates for Calendar Year 2025. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

10. ADOPTING SETTLEMENT AUTHORITY POLICY

Board Operations Committee Chair Miller reported that this item was brought to the committee and they unanimously approved the item. SunLine Transit Agency Board Member Miller moved to approve the Adopting Settlement Authority Policy. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

**SUNLINE TRANSIT AGENCY/
SUNLINE SERVICES GROUP
BOARD OF DIRECTORS MEETING - MINUTES
OCTOBER 23, 2024**

11. FIRST READING OF SUNLINE SERVICES GROUP (SSG) ORDINANCE NO. 2024-02, TAXICAB SERVICE ORDINANCE

Taxi Committee Chair Kelly reported that this item was brought to the committee and they unanimously approved the item with one modification to make the ordinance effective 20 days after the second reading and adoption. SunLine Transit Agency Board Member Kelly moved to approve the First Reading of SunLine Services Group (SSG) Ordinance No. 2024-02, Taxicab Service Ordinance, as amended. The motion was approved by a unanimous vote of 10 yes; 0 no; 0 abstain.

12. LEGISLATIVE UPDATE

An oral report was provided by Edith Hernandez, Clerk of the Board/Director of Legislative Affairs on this information item.

Comments were made by:

- Board Member Middleton, City of Palm Springs

13. CEO/GENERAL MANAGER'S REPORT

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

14. NEXT MEETING DATE

December 4, 2024 at 12 p.m.
Board Room
32-505 Harry Oliver Trail
Thousand Palms, CA 92276

15. ADJOURN

The SunLine Services Group and SunLine Transit Agency meeting concurrently adjourned at 12:31 p.m.

Respectfully Submitted,

Edith Hernandez
Clerk of the Board/Director of
Legislative Affairs

SunLine Services Group

CONSENT CALENDAR

DATE: December 4, 2024

APPROVE

TO: Taxi Committee
Board of Directors

RE: Acceptance of Checks \$1,000 and Over Report for September 2024

Summary:

This report lists all of the checks processed at the Agency with a value of over \$1,000 for a given month.

Recommendation:

Approve.

**SunLine Regulatory Administration
Checks \$1,000 and Over
September 2024**

Vendor Filed As Name	Description	Check #	Payment Date	Payment Amount
SUNLINE TRANSIT AGENCY	Payroll Liabilities 09/13/2024	91348	09/18/2024	2,451.68
SUNLINE TRANSIT AGENCY	Payroll Liabilities 08/30/2024	91344	09/05/2024	2,191.90
Total Checks Over \$1,000	\$4,643.58			
Total Checks Under \$1,000	\$1,256.80			
Total Checks	\$5,900.38			

SunLine Services Group
CONSENT CALENDAR

DATE: December 4, 2024 **APPROVE**

TO: Taxi Committee
Board of Directors

RE: Acceptance of Monthly Budget Variance Report for September 2024

Summary:

The budget variance report compares revenues and expenses to the respective line item budgets. The report identifies current monthly revenues and expenses as well as fiscal year to date (FYTD) values. The budgetary figures are represented as a straight line budget. Accordingly, the current monthly budget values are calculated by taking 1/12th of the annual budget. The FYTD budget values for the month of September 2024 are equal to 3/12^{ths} of the yearly budget.

Year to Date Summary

- As of September 30, 2024, the organization's revenues are \$14,944 or 31.53% above the FYTD budget.
- As of September 30, 2024, expenditures are \$18,963 or 40.01% below the FYTD budget.
- The net FYTD operating gain (loss) after expenses is \$33,907.

Recommendation:

Approve.

SunLine Regulatory Administration
Budget Variance Report
September 2024

Description	FY25 Total Budget	Current Month			Year to Date			
		Actual	Budget	Positive (Negative)	FYTD Actual	FY25 FYTD Budget	Positive (Negative)	Percentage Remaining
Revenues:								
Revenue Fines	3,500	-	292	(292)	900	875	25	74.3%
New Driver Permit Revenue	750	225	63	163	600	188	413	20.0%
Taxi Business Permit	96,000	5,854	8,000	(2,146)	29,855	24,000	5,855	68.9%
Driver Transfer Revenue	125	25	10	15	50	31	19	60.0%
Driver Renewal Revenue	1,725	375	144	231	575	431	144	66.7%
Vehicle Permit Revenue	86,000	9,927	7,167	2,760	30,364	21,500	8,864	64.7%
Operator Application Fee	1,500	-	125	(125)	-	375	(375)	100.0%
Total Revenue	189,600	16,406	15,800	606	62,344	47,400	14,944	31.5%
Expenses:								
Salaries and Wages	88,369	8,130	7,364	(766)	16,181	22,092	5,911	81.7%
Fringe Benefits	61,290	(4,255)	5,108	9,363	(190)	15,323	15,513	100.3%
Services	18,315	1,470	1,526	56	2,019	4,579	2,560	89.0%
Supplies and Materials	3,585	10,186	299	(9,887)	9,935	896	(9,038)	-177.1%
Utilities	5,802	-	484	484	-	1,451	1,451	100.0%
Casualty and Liability	5,589	-	466	466	-	1,397	1,397	100.0%
Taxes and Fees	50	-	4	4	-	13	13	100.0%
Miscellaneous	6,600	192	550	358	492	1,650	1,158	92.5%
Total Expenses	189,600	15,722	15,800	78	28,437	47,400	18,963	40.0%
Total Operating Surplus (Deficit)	\$ -	\$ 684			\$ 33,907			

Budget Variance Analysis - SunLine Regulatory Administration

Revenue

- The positive variance in revenue is largely due to increases in vehicle permit revenue and taxi business permit revenue due to one (1) unanticipated additional taxi business for FY25.
- As of FYTD25, there is a decrease of 1,300 taxi trips compared to FYTD24.

Taxi Trips

	FY24-September	FY25-September	Variance	%Δ
Trips	6,763	6,083	(680)	-10.1%

Taxi Trips

	FYTD-FY24	FYTD-FY25	Variance	%Δ
Trips	17,111	15,811	(1,300)	-7.6%

Salaries and Wages

- Wage expenses are below budget due to vacancies throughout the year.

Fringe Benefits

- Fringe benefit expenses are within an acceptable range of the budget. A book entry was made in September during audit reconciliation which decreased expenses for the month.

Services

- The favorable variance is due to lower than expected YTD costs for legal and audit services.

Supplies and Materials

- Supplies and material expenses are over budget due to an allocation of overhead expenses from SunLine Transit Agency to SunLine Regulatory Administration.

Utilities

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

Casualty and Liability

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

Taxes and Fees

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

Miscellaneous

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

SunLine Services Group
CONSENT CALENDAR

DATE: December 4, 2024

APPROVE

TO: Taxi Committee
Board of Directors

RE: Acceptance of Taxi Trip Data – September 2024

Summary:

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

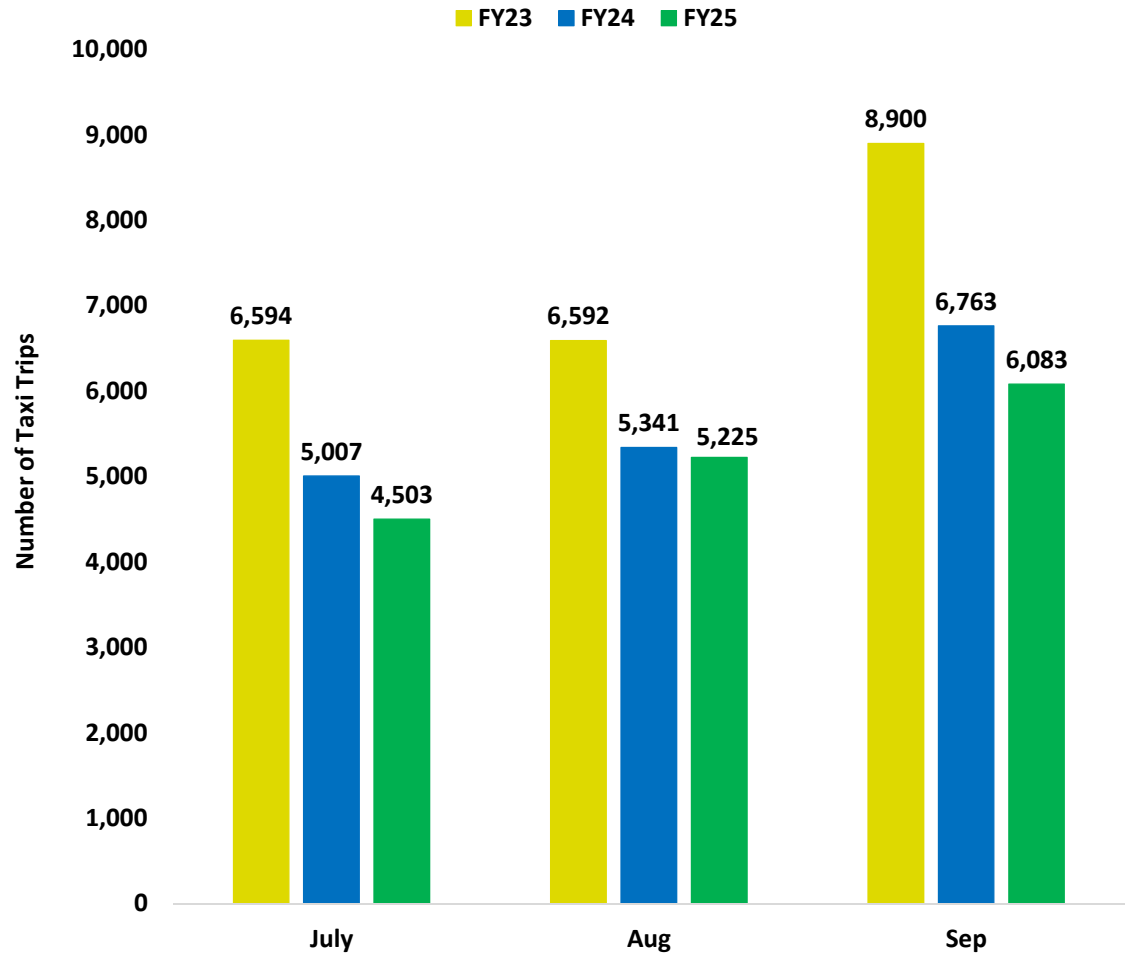
For the month of September 2024, there were 680 fewer taxi trips serviced by six (6) more cabs when compared to September 2023 (65 cabs in 2024 compared to 59 cabs in 2023).

There were 1,300 fewer taxi trips for FYTD25 compared to FYTD24.

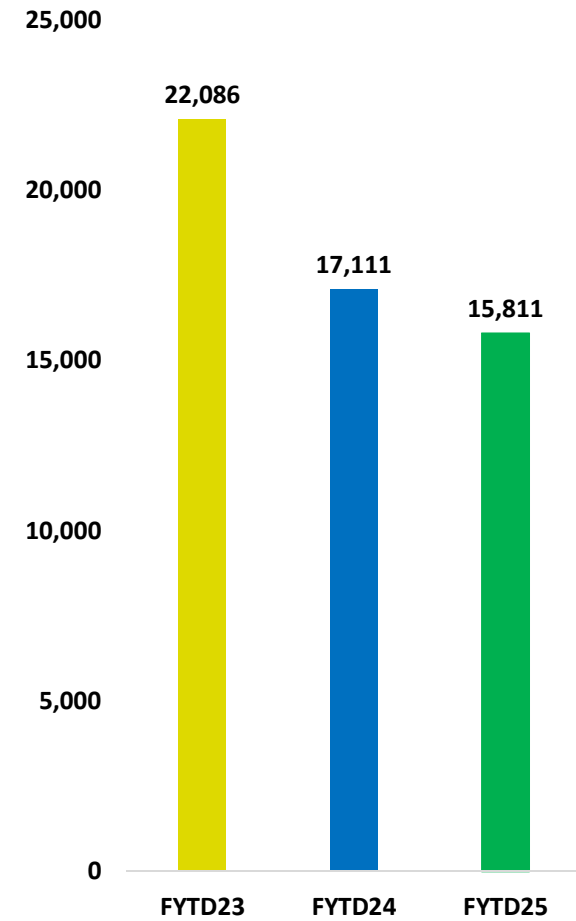
Recommendation:

Approve.

Taxi Trip Three (3) Month Comparison as of September 2024



FYTD No. of Taxi Trips



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

SunLine Transit Agency**DATE: December 4, 2024****RECEIVE & FILE****TO: Finance/Audit Committee
Board of Directors****FROM: Luis Garcia, Chief Financial Officer****RE: Fiscal Year 2024 Financial Audit Reports**

Recommendation

Recommend that the Board of Directors receive and file the fiscal year (FY) 2024 financial audit reports. The financial audits were completed by Vasquez & Company, LLP and include financial audits for SunLine Transit Agency (SunLine) and SunLine Services Group (SSG).

Background

The Joint Powers Agreement requires that SunLine and SSG have an independent audit of its finances conducted annually. In addition, state law requires that recipients of Transportation Development Act (TDA) funds undergo an annual financial audit. TDA funds comprise the majority of SunLine's operating revenues, which are disbursed by Riverside County Transportation Commission (RCTC), the planning agency for SunLine.

In addition to the FY 2024 financial audit, the Code of Federal Regulations (2 CFR Part 200) requires an entity that expends more than \$1,000,000 in federal awards during a fiscal year undergo a single audit. A single audit ensures that federal funds are expended properly. Submission of the single audit is required nine (9) months following the end of the entity's fiscal year or thirty (30) days after the completion of the financial statements, whichever is earlier. Due to timing issues, the single audit report for FY24 will be presented to the Board during the January 2025 Board Meeting. Although the single audit report for the Board will be delayed until January, all timelines have been met and no extensions are required to stay in compliance with the regulations.

Audit Outcome

The auditors presented an unmodified opinion with no significant deficiencies.

SunLine Transit Agency

DATE: December 4, 2024 **ACTION**

TO: Finance/Audit Committee
Board of Directors

FROM: Luis Garcia, Chief Financial Officer

RE: California Transit Training Consortium Agreement Approval

Recommendation

Recommend that the Board of Directors delegate authority to the CEO/General Manager to negotiate and execute a one (1) year contract with the Southern California Regional Transit Training Consortium, doing business as the California Transit Training Consortium (CTTC) for the scope of work in SunLine Transit Agency's (SunLine) agreement with the California Energy Commission's (CEC) Clean Transportation Program Grant ARV-21-070-01 at a total cost not exceed \$466,900, subject to approval as to form by General Counsel.

Background

Assembly Bill (AB) 118, enacted in 2007, established the Clean Transportation Program under the CEC, with an annual budget of approximately \$100 million. This program promotes alternative and renewable fuels and advanced vehicle technologies to support California's climate change, clean air, and energy policies.

In October 2021, the CEC released a competitive grant solicitation titled "IDEAL ZEV Workforce Pilot" to fund training initiatives in the zero-emission vehicle (ZEV) sector, with a focus on disadvantaged and low-income communities. SunLine successfully secured a \$500,000 grant under this solicitation for workforce development activities through the West Coast Center of Excellence and executed the original grant agreement in July 2022.

Since that time, SunLine determined that it was in the best interest of the agency to partner with CTTC to jointly create a new scope of work focused on developing curriculum and conducting educational workshops which align with current priorities and training requirements. The workshops include electrical courses tailored for high school students and transit-focused training sessions. SunLine staff collaborated with the CEC to allow SunLine to pass-through the funds to CTTC so it can deliver the updated scope of work.

Established in 2004, the CTTC is a collaborative organization dedicated to providing workforce development, training, and educational resources for the public transit industry in California. CTTC partners with transit agencies, community colleges, and industry

stakeholders to develop programs that enhance technical skills, promote safety, and support the adoption of emerging transportation technologies. CTTC is widely recognized for fostering innovative and sustainable solutions to workforce challenges in California's public transit landscape.

Financial Impact

The financial impact of \$466,900 is included in the SunLine's Fiscal Year (FY) 2025 operating budget.

Performance Goal

Goal 1: Workforce Investment – Approval of this agreement supports SunLine's FY25 workforce investment goal. The curriculum and training resources developed through this partnership will benefit SunLine staff and other transit agencies across California, advancing industry readiness for zero-emission technologies.

SunLine Transit Agency

DATE: December 4, 2024 **ACTION**

TO: Board Operations Committee
Board of Directors

FROM: Bryan Valenzuela, Chief Safety Officer

RE: Approve Revised SunLine Public Transportation Agency Safety Plan

Recommendation

Recommend that the Board of Directors approve the updated Public Transportation Agency Safety Plan (PTASP), which reflects the latest Federal Transit Administration (FTA) requirements, including enhancing safety measures, ensuring the protection of passengers, employees, and the public.

Background

The FTA initially adopted its PTASP regulations in 2018, thereby requiring certain operators of public transportation systems to adopt comprehensive safety plans. Effective May 13, 2024, the FTA published its first major update to the PTASP regulations, which advance the Safety Management System processes, increase the involvement of the Safety Committee, and further address safety hazards. These changes necessitate updates to SunLine's existing PTASP to align with the new federal guidelines. The updated PTASP includes comprehensive safety performance targets, risk management strategies, and safety assurance protocols.

Key Updates:

- 1. Safety Performance Targets:**
 - New targets established to meet FTA guidelines.
 - Regular tracking and reporting of safety metrics.
- 2. Risk Management:**
 - Enhanced procedures for risk assessment, including expanding the involvement of the Safety Committee.
 - Development of strategies to mitigate identified risks, including increased reporting requirements related to mitigation strategies.
- 3. Safety Assurance:**
 - Continuous monitoring and auditing of safety practices.
 - Regular reviews and updates to the safety plan.
- 4. Employee Training:**
 - Comprehensive training on updated safety protocols.

- Ongoing education on drills to ensure readiness.
- 5. De-escalation Training:**
- Implementation of de-escalation training programs to equip employees with skills to handle conflicts and reduce the risk of assaults.
- 6. Reduction of Transit Worker Assaults:**
- Introduction of measures aimed at reducing transit worker assaults.
 - Enhanced security protocols and support systems for employees.

SunLine's Safety department has been working closely with SunLine's frontline employee representatives on a bi-weekly basis to revise and develop the required sections of the PTASP. The Safety Committee has approved the updated SunLine PTASP.

Financial Impact

There is no financial impact for this item.

Performance Goal

Goal 2A: To strive to deliver highly accessible, convenient and trusted mobility solutions that efficiently meet the diverse needs of the Coachella Valley citizens and improve their connectivity to daily life needs by maximizing system safety to include physical and operational security and overall resilience through reinforcing mitigating actions taken to reduce the likelihood and severity of potential consequences to individuals and transit agency assets.

Attachments:

- [Item 13a](#) – Redlined SunLine PTASP
- [Item 13b](#) – SunLine PTASP (Redlined Changes Accepted)

SunLine Transit Agency - Public Transportation Agency Safety Plan

1. Transit Agency Information

Transit Agency Name	SunLine Transit Agency			
Transit Agency Address	32-505 Harry Oliver Trail, Thousand Palms, CA 92276			
Name and Title of Accountable Executive	Mona Babauta , CEO/General Manager			
Name of Chief Safety Officer or SMS Executive	<u>Bryan Valenzuela</u> Vanessa Mora , Chief Safety Officer			
Mode(s) of Service Covered by This Plan	Fixed Route Paratransit Microtransit	List All FTA Funding Types (e.g., 5307, 5337, 5339)	5307, 5310, 5311, 5309, 5313, 5339, CMAQ	
Mode(s) of Service Provided by the Transit Agency (Directly operated or contracted service)	Fixed Route Bus; Paratransit; Microtransit			
Does the agency provide transit services on behalf of another transit agency or entity?	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>	Description of Arrangement(s)	N/A
Name and Address of Transit Agency(ies) or Entity(ies) for Which Service Is Provided	N/A			

2. Plan Development, Approval, and Updates

Name of Entity That Drafted This Plan	<u>Bryan Valenzuela</u> Vanessa Mora , Chief Safety Officer, SunLine Transit Agency	
Signature by the Accountable Executive	Signature of Accountable Executive	Date of Signature
	Mona Babauta-, CEO/GM	

SunLine Transit Agency - Public Transportation Agency Safety Plan

Approval by the Board of Directors or an Equivalent Authority	Name of Individual/Entity That Approved This Plan	Date of Approval
	SunLine Board of Directors:	
	Lisa Middleton <u>Nancy Ross</u> -, Chair	
	Relevant Documentation (Title and Location)	
	Title 1, Division 7, Chapter 5 of the California Government Code Section 6500 et seq.	

Version Number and Updates			
<i>Record the complete history of successive versions of this plan.</i>			
Version Number	Section/Pages Affected	Reason for Change	Date Issued
1.0	All Pages	Original	9/30/2020
1.1	All Pages	Agency changes	12/07/2022
1.2	Pages 1-3, 24	Change in Accountable Executive, change in Board of Directors Chair, and revision to 49 U.S.C. § 5329 (d)	09/27/2023
<u>1.3</u>	<u>Pages 1-3, 5, 7-12, 14, 15, 17, 24-26, 28-29, 31, 33-35</u> All Pages	<u>New Federal Requirements</u>	<u>12/04/25/2024</u>

Annual Review and Update of the Agency Safety Plan
<i>Describe the process and timeline for conducting an annual review and update of the ASP.</i>
<p>SunLine’s Agency Safety Plan is reviewed annually, or at more frequent intervals as appropriate, incorporating any findings from SOP# Safety 0027 – Safety Review Process</p> <ul style="list-style-type: none"> • The update process begins at the weekly Chief’s meeting as directed by the <u>Accountable Executive/CEO/General Manager</u>. • The Chief Safety Officer initiates the process of update. • The Safety Plan update includes a review of any safety concerns raised by staff, observed by staff, or otherwise brought to the attention of the Chiefs and the Safety Committee throughout the year; and the results of the Safety Review Process. • Each Chief with a potential safety issues is responsible for investigating the issue and recommending changes. • Any recommended changes to policies/procedures are incorporated into the Safety Plan by the Chief Safety Officer and presented at the Chiefs Meetings for review and first level approval. • The updated plan is submitted to Chiefs for review and approval. • After the updated plan has been approved by the Chiefs, the Chief Safety Officer present the Safety Plan to the <u>CEO/General Manager/Accountable Executive</u> for approval.

SunLine Transit Agency - Public Transportation Agency Safety Plan

- After the Accountable Executive approves the Safety Plan, it is presented to the Safety Committee for approval.
- After the CEO/General Manager/Safety Committee approves the Safety Plan, it is presented to the Board of Directors for final approval.

3. Safety Performance Targets

Safety Performance Targets							
<i>Specify performance targets based on the safety performance measures established under the National Public Transportation Safety Plan.</i>							
Mode of Transit Service	Fatalities (Total)	Fatalities (per 100k VRM)	Injuries (Total)	Injuries (per 100k VRM)	Safety Events (Total)	Safety Events (per 100k VRM)	System Reliability (failures per 100k VRM)
Fixed-Route	0	0	3	0.10	8	0.27	12.72
Paratransit	0	0	0	0.00	0	0.00	4.06

Safety Performance Targets		
<i>Specify performance targets based on the safety performance measures established under the National Public Transportation Safety Plan.</i>		
Event Type	Mode of Transit Service	
	Fixed Route	Paratransit
Fatalities (Total)	1	0
Fatalities (Per 100K VRM)	0.01	0
Injuries (Total)	289	67
Injuries (Per 100K VRM)	0.32	0.259
Major Safety Events (Total)	204	34
Major Safety Events Rate (Per 100K VRM)	0.23	0.136
Vehicle v. Vehicle Collisions Total	20	3
Collision Rate (Per 100K VRM)	0.23	0.13
System Reliability (Failures per 100K VRM)	14.20	7.39
Transit Worker Assaults (Total)	N/A	N/A
Transit Worker Assaults (Per 100K VRM)	N/A	N/A
Transit Worker Fatality Rate (Per 100K VRM)	0.00	0.00
Transit Worker Injury Rate (Per 100K VRM)	0.00	0.00
Vehicle v. Pedestrian (Total)	0	0
Vehicle v. Pedestrian (Per 100K VRM)	0.00	0.00

Safety Performance Target Coordination

Describe the coordination with the State and Metropolitan Planning Organization(s) (MPO) in the selection of State and MPO safety performance targets.

Safety Performance Targets submitted to Southern California Associated Governments (SCAG) for consultation and recommendations.

SunLine Transit Agency - Public Transportation Agency Safety Plan

Targets Transmitted to the State	State Entity Name	Date Targets Transmitted
	California Department of Transportation	
Targets Transmitted to the Metropolitan Planning Organization(s)	Metropolitan Planning Organization Name	Date Targets Transmitted
	Southern California Associated Governments	4/9/2020

4. Safety Management Policy

Safety Management Policy Statement	
<i>Use the written statement of safety management policy, including safety objectives.</i>	
<p>At SunLine Transit Agency, safety is defined as a system-wide coordination of all departments to apply operating practices, technical management techniques, and guiding principles to preserve, life, property, and the environment. At the core of our commitment to safety is our drive to:</p> <ul style="list-style-type: none"> • Provide a safe working environment for our employees • Incorporate safety into our resource management decisions • Keep our passengers safe • Be good stewards of the environment <p>The Safety Management Policy is included as Appendix A.</p>	
Safety Management Policy Communication	
<i>Describe how the safety management policy is communicated throughout the agency. Include dates where applicable.</i>	
<p>Upon completion of the review process and securing final Board Approval, the Chief Safety Officer distributes the updated Safety Plan, which includes the Safety Management Policy, to each Department Chief for dissemination to staff.</p>	
Authorities, Accountabilities, and Responsibilities	
<i>Describe the role of the following individuals for the development and management of the transit agency's Safety Management System (SMS).</i>	
Accountable Executive	<p>The CEO/General Manager serves as SunLine's Accountable Executive with the following authorities, accountabilities, and responsibilities under this plan:</p> <ul style="list-style-type: none"> • Provide oversight of all Safety Plan policies, recommendations, actions, and modifications. • Delegation of responsibilities as appropriate to Department Heads and follow-up on all issues and discussions. • Allocation/approval of funds to minimize and reduce hazards to implement valid suggestions from the Safety Committee. • <u>Provisions of leadership and directions in the administration of safety activities by showing support for safety rules and objectives.</u> • <u>Implement safety risk mitigations for the safety risk reduction program.</u>

SunLine Transit Agency - Public Transportation Agency Safety Plan

	<ul style="list-style-type: none"> • <u>Consider all other safety risk mitigations recommended by the Safety Committee.</u>
<p>Chief Safety Officer or SMS Executive</p>	<p>The Chief Safety Officer has the following authorities, accountabilities, and responsibilities under this plan:</p> <ul style="list-style-type: none"> • Informs all employees of new safety issues and regulations to ensure compliance. • Report to the nearest California Occupations Safety and Health Administration (CAL-OSHA) office of any fatal safety events, or which result in hospitalization of three or more employees. • Prioritize the safety hazards and post in all areas used for employee communication, a list of hazards in descending order, starting with the most severe hazards first. • Coordinate with the Chief Maintenance Officer in Hazard Identification and Resolution. • Inspect all SunLine facilities on a monthly basis. • Manage the Hazardous Materials Business Plan with the Chief of Maintenance. • Coordinate contractor safety programs with the Chief of Performance. • Ensure that hazardous materials and waste are dealt with properly. • Ensure employees are warned of potential risks and dangers of hazardous materials in accordance with SOP #Safety 0028 – Hazardous Materials Communication. • Investigate every industrial injury for cause, preventability and any necessary post-safety event training. • Track, monitor and manage the modified duty program for employees returning to work with restrictions. • Establish and manage the SunLine Safety Incentive Program for all agency employees. • Maintain all SunLine collision/injury files to identify and establish collision/injury trends and possible corrective actions. • Track safety Key Performance Indicators (KPI) for all agency employees and departments. • <u>Reports directly to the CEO/General ManagerAccountable Executive of any and all issues concerning safety and security of the agency, employees, passengers, visitors, contractors and equipment.</u> • <u>Establish and update operating procedures and communicate them to supervisors so they may follow safety requirements.</u> • <u>Organize, plan and present the agency's employee safety meetings to all active employees.</u> • <u>Organize and schedule Safety Committee meetings in accordance with SOP #Safety 0018 – Safety Committee</u> • <u>Ensure the Safety Committee meeting minutes are posted for all employees to see.</u> • <u>Investigate all SunLine Transit Agency collisions and injuries for preventability.</u> • <u>Conduct post-collision, injury and safety event retraining of SunLine employees.</u> • <u>Submit monthly safety and security data to the National Transit Database.</u> • <u>Conduct monthly facility checks at all SunLine properties using SOP #Safety 0029 – Daily Safety Walkthrough Assessment Process.</u>

SunLine Transit Agency - Public Transportation Agency Safety Plan

<p>Agency Leadership and Executive Management</p>	<p>Agency Leadership and Executive Management also have authorities and responsibilities for day-to-day SMS implementation and operation of SunLine’s SMS under this plan. SunLine Transit Agency Leadership and Executive Management include:</p> <ul style="list-style-type: none"> • Chief of Staff • Chief Transportation Officer • Chief of Human Relations • Chief Administrative Officer of Compliance • Chief Planning Officer • Chief of Capital Projects • Chief Financial Officer • Chief Maintenance Officer • Deputy Chief Facilities Officer Deputy Chief Safety Officer • Deputy Chief of Human Relations • Deputy Chief Maintenance Officer • Deputy Chief Transportation Officer of Transit Operation • Operations Managers and Supervisors • Safety, Risk, and Training Managers <p>SunLine Leadership and Executive Management personnel have the following authorities, accountabilities, and responsibilities:</p> <ul style="list-style-type: none"> • Participate as members of SunLine’s Safety Committee (operations manager and supervisors will be rotated through the Safety Committee on a one-year term and other positions are permanent members). • Complete training on SMS and SunLine’s Agency Safety Plan (ASP) elements. • Oversee day-to-day operations of the SMS in their departments. • Modify policies in their departments consistent with implementation of the SMS, as necessary. • Provide subject matter expertise to support implementation of the SMS as requested by the Accountable Executive or the Chief Safety Officer, including Safety Risk Management (SRM) activities, investigation of safety events, development of safety risk mitigations, and monitoring of mitigation effectiveness.
<p>Agency Leadership and Executive Management</p>	<p>Chief of Human Relations</p> <ul style="list-style-type: none"> • Maintain the CAL-OSHA Log 300. Post the CAL-OSHA Log 300 (the previous years recorded safety events) in the month of February. • Review SunLine’s safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable. • Ensure all employees go through hazardous materials training annually. • Ensure a new employee receives hazardous materials training within six months from the date of hire. • Securely store all health and safety records, files, etc. pertaining to each employee including items such as training signoffs and copies of medical exams & records. • Ensure all Human Resources Department employees attend designated mandatory safety meetings.

SunLine Transit Agency - Public Transportation Agency Safety Plan

- Attend safety meetings and support the safety message being presented by the Safety Department. Present Human Resources specific information as needed to reinforce the goals of SunLine safety culture.
- Track safety KPI's for the Human Resources Department staff and personnel to reduce or eliminate collision/injury trends.
- Support the SunLine Safety Incentive Program by setting the example and encouraging all employees to put safety first and reduce the chances of injuries and collisions.

Chief Transportation Officer

The Operations Department is assigned the responsibility for the safe operation of paratransit and fixed route buses throughout the SunLine Service Area.

These responsibilities include:

- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Prepare and implement safe operating policies, plans, rules and procedures.
- Develop required policies, plans, rules, procedures and contingency plans for safe operation reviewed by the Safety Department and approved by the Accountable Executive/CEO/General Manager. Revise when needed to reflect current operating conditions.
- Provide ongoing training and testing of personnel in the proper performance of safe-related operating policies, plans, rules, and procedures.
- Overview training, testing and certification in the proper performance of all safety-related rules and procedures. This applies to both normal and emergency conditions. Provide employees with copies of safety and emergency rules, procedures, and policies that affect them.
- Monitor adherence to safety-related operating policies, plans, rules and procedures. Personnel whose safety record requires follow-up, additional training, or discipline, including discharge, are identified through the maintenance of records which indicate safety violations of rules and procedures. Safety violations are reported to the Chief Safety Officer.
- Correct conditions which have caused or have the potential to cause injury to persons or damage to property/equipment.
- Ensure all Maintenance employees attend on-going tailgate training sessions.
- Ensure all Dispatchers, Supervisors, and any other safety-sensitive personnel attend safety meetings as prescribed.
- Attend employee safety meetings and support the safety message being presented by the Operations Department and all other department with a safety message. Present operations-specific information as needed to reinforce the goals of SunLine Transit Agency safety culture.
- Track safety KPI's for Operations Department staff and personnel to reduce or eliminate collision/injury trends.
- Support the SunLine Safety Incentive Program by setting the example and encouraging all employees to put safety first and reduce the chances of injuries and collisions.
- Review reported safety concerns from employees/passengers on bus routes/stops in conjunction with the Director of Planning.
- **Deputy Chief Safety Officer**

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~~Establish and update operating procedures and communicate them to supervisors so they may follow safety requirements.~~

~~Organize, plan and present the agency's employee safety meetings to all active employees.~~

~~Organize and schedule Safety Committee meetings in accordance with **SOP #Safety 0018 – Safety Committee**~~

~~Ensure the Safety Committee meeting minutes are posted for all employees to see.~~

~~Investigate all SunLine Transit Agency collisions and injuries for preventability.~~

~~Conduct post-collision, injury and incident retraining of SunLine employees.~~

~~Submit monthly safety and security data to the National Transit Database.~~

- ~~Conduct monthly facility checks at all SunLine properties using **SOP #Safety 0029 – Daily Safety Walkthrough Assessment Process.**~~

Superintendent of Facility Maintenance/Deputy Chief of Facilities

The Maintenance Department is assigned the responsibility of maintaining all vehicles in a safe condition.

These responsibilities include:

- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Preparation and implementation of safe maintenance policies, plans, rules and procedures.
- Required policies, plans, rules and procedures for safe operation and maintenance are developed by the Maintenance Department and are approved by the Safety Department. They are revised when needed to reflect current operating conditions.
- Personnel are systematically trained, tested and certified in the proper performance of all safety-related rules and procedures. This applies to both normal and emergency conditions. Employees are provided with copies of safety and emergency rules, procedures, and policies that affect them.
- There is ongoing testing of personnel in the proper performance of safety-related operating and maintenance policies, plans, rules, and procedures. The Department also monitors adherence to safety-related operating and maintenance policies, plans, rules and procedures.
- Personnel whose safety record requires follow-up, additional training, or discipline, including discharge, are identified through the maintenance of records which indicate safety violations of rules and procedures. Safety violations are reported to the Safety Department. Conditions are corrected which have caused or have the potential to cause injury to persons or damage to property/equipment.

In addition to the responsibilities listed, specific actions include:

- Act as an interface between SunLine and manufacturers, to correct any severe safety hazards related to equipment and materials.
- Ensures Safety Data Sheets (SDS's) meet the requirements of **SOP #Safety 0028 – Hazardous Materials Communication** and that on-line subscription programs are available to all employees.
- Maintain a chemical inventory that is update monthly.
- Coordinate with the Chief Safety Officer to create and implement SunLine's Hazardous Materials Business Plan.
- Ensure that hazardous materials and waste are dealt with properly. Monitor the areas where hazardous wastes are handled and ensure that employees actions

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	<p>when entering, while within and when exiting are appropriate for existing conditions.</p> <ul style="list-style-type: none"> • Ensure all Maintenance Department employees attend designated mandatory safety meetings. • Ensure all Maintenance Department employees attend weekly tailgate safety meetings. • Conduct bus stop safety inspections as part of weekly cleaning and maintenance. • Attend employee safety meetings and support the safety message being presented by the Safety and Operations Departments. Present maintenance specific information as needed to reinforce the goals of SunLine Transit Agency safety culture. • Analyze and review safety KPI's for Maintenance Department staff and personnel to reduce or eliminate collision/injury trends. • Support the SunLine Safety Incentive Program by setting the example and encouraging all employees to put safety first and reduce the chances of injuries and collisions. <p>Chief Financial Officer</p> <ul style="list-style-type: none"> • Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable. • Ensure all purchases comply with applicable FTA and DOT safety requirements. • Ensure all specifications for purchases are closely reviewed to ensure purchase of safe materials and equipment. • Work closely with the Chief Maintenance Officer to ensure all purchases are closely inspected to ensure acceptance of safe materials and equipment. • Attend employee safety meetings and support the safety message being presented by the Safety and Operations Departments. Present finance specific information as needed to reinforce the goals of SunLine safety culture. • Ensure all Finance Department employees attend designated mandatory employee safety meetings. • Participate in emergency disaster planning for the recovery of the financial disaster situation. • Analyze and review safety KPI's for Finance Department staff and personnel to reduce or eliminate collision/injury trends. • Support the SunLine Safety Incentive Program by setting the example and encouraging all employees to put safety first and reduce the chances of injuries and collisions. <p>Planning ManagerChief Planning Officer</p> <ul style="list-style-type: none"> • Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable. • Work closely with the Safety and Operations Departments on review of route and bus stops and shelter establishment and ongoing operations. • Attend employee safety meeting and ensure departmental staff attends meetings. • Support and enforce all safety and security policies and procedures established by the agency. • Analyze and review safety KPI's for Planning staff and personnel to reduce or eliminate collision/injury trends. • Support the SunLine Safety Incentive Program by setting the example and encouraging all employees to put safety first and reduce the chances of injuries and collisions.
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SunLine Transit Agency - Public Transportation Agency Safety Plan

	<p>Chief of StaffAdministrative Officer</p> <ul style="list-style-type: none"> • Represent SunLine to external audiences and stakeholders, including interactions and cooperative agreements with other local governmental agencies and regional entities regarding transportation programs and services. • Primary liaison between the <u>Accountable Executive</u>CEO/General Manager and all SunLine staff, constituents and the Board of Directors. • Work closely with the Executive Team as part of a strong leadership team working on behalf of the CEO/General Manager<u>Accountable Executive</u>. • Oversee strategic consultation to the CEO/General Manager<u>Accountable Executive</u> on major issues affecting the agency. <p>Provide day-to-day oversight, policy direction and high-performance development for all key departments to enhance the overall customer experience of SunLine riders.</p> <p>Chief Maintenance Officer</p> <ul style="list-style-type: none"> • Authorizes the purchase of parts, equipment tools, and supplies. • Ensures compliance with local, state and federal requirements regarding maintenance-related projects. • Coordinates activities within maintenance operations to assure peak performance and productivity, as well as conformance with established or mandated external regulations and policies affecting SunLine operations; measures performance levels and goal achievement. • Facilitates and leads the department in developing and administering operating plans, policies, procedures and labor contracts. • Monitors maintenance expenditures; administers the maintenance budget; coordinates special projects. • Contributes to the Executive Team in the areas of strategic planning, setting priorities, budgeting, safety, service quality and labor relations.
<p>Key Staff</p>	<p>Safety Committee Members</p> <ul style="list-style-type: none"> • Make certain that employees have and use safe tools and equipment (including personal protective equipment) and that equipment is maintained properly. • Report any safety hazard to the Safety Department immediately. • Act as an interface between the employees and the Safety Department. • Ensure employees follow the safety rules and report any employee who violates the safety rules. • Give leadership and direction in administration of safety activities by showing support for safety rules and objectives. • Have the necessary job knowledge relating to all machines and processes in their area of responsibility. • <u>Conduct quarterly site inspections and post results in operations and maintenance lounge.</u> • <u>Set annual safety performance targets for Safety Risk Reduction Program.</u> • <u>Identify and recommend mitigations for any potential consequences identified through risk assessments, including where we did not meet targets in the safety risk reduction program.</u> • <u>Identify ineffective/inappropriate or poorly implemented mitigations, including where we did not meet targets in the safety risk reduction program.</u> • <u>Identify safety deficiencies for purposes of continuous improvements (SA), including where we did not meet targets in the safety risk reduction program.</u>

SunLine Transit Agency - Public Transportation Agency Safety Plan

All employees at SunLine Transit have a role in safety. In an effort to ensure that safety responsibilities are understood, the following chart describes the safety roles for each job classification.

SunLine Transit Agency		
Job Classification	Job Description/Responsibility	Applicable Codes
Clerical	Administrative Assistant, Accounting Tech, Marketing Rep., Receptionist, Customer Service: Tasks include computer operations, telephone, fax, filing, appointments, check processing and xeroxing. Equipment: Computer equipment, copier, telephone, file cabinets, postage meter, radios 10-key.	1,2,5
Operations Dispatcher	Dispatches motor coach operators, provides route and schedule information. Equipment: Radios, computer equipment, copier, telephone, typewriter and file cabinets.	1,2
Operations Operators	Operates and drives a motor coach along prescribed routes. Equipment: Motor coach, radios, winches , ramps and wheelchair lifts.	1,5
Operations Supervisor	Supervises motor coach operators to ensure schedule adherence and safe operation. Equipment: Company vehicles, radios, computer equipment, cellphone , copier, typewriter , tablets (ipad) and telephone.	1,2,5
Maintenance/Utilities	Maintains and cleans vehicles and facilities. Equipment: Vacuums, bus wash, paint, solvents, ladders, scaffolding and hoses.	1,3,4,5
Maintenance/Property Maintainers & Supervisors	Maintains, cleans and installs bus stops. Removes graffiti, steam cleans and empties trash. Equipment: Stam cleaners, sand blasters, standard tools, ladders, solvents, paints, nails and drills.	1,3,4,5
Maintenance/Mechanics & Supervisors	Performs vehicle repair work and diagnostic analysis.	1,2,3,4,5

SunLine Transit Agency - Public Transportation Agency Safety Plan


		Equipment: Mechanics tools, diagnostic equipment, paint, oil and transmission fluids, welding equipment.																									
	Maintenance/Facilities	Maintains and cleans exteriors of buildings. Equipment: Lawn and garden equipment, paints, hammers.	1,3,4,5																								
	Maintenance/Body Technician	Performs vehicle inspections and repairs as directed. Equipment: Welding equipment, lifts, paint spray, mechanic tools, air hose, diagnostic equipment, oils and fluids.	1,3,4,5																								
	Maintenance/Training Supervisor & Director of Maintenance	Supervises, trains, and directs the work of mechanics and utility personnel. Equipment: Gas engines, mechanic tools, transmissions, batteries, electrical wiring, CNG, paints and welding materials.	1,2,3,4,5																								
<p>Applicable Codes</p> <p>SOP #Safety 0025 – Codes of Safe Practice describes safety requirements for work conditions, safe work practices, and personal protective equipment. These may be used to train new employees and employees who are changing their job assignment.</p> <p>NOTE: Codes are numbered and correspond with “Safe Practice” description.</p> <table border="1"> <thead> <tr> <th colspan="3">Codes of Safe Practices</th> </tr> <tr> <th>Code #</th> <th>Category</th> <th>Employees</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>General Safety</td> <td>All employees</td> </tr> <tr> <td>2</td> <td>Administrative</td> <td>Clerical/Management</td> </tr> <tr> <td>3</td> <td>Material Handling</td> <td>Operations/Maintenance</td> </tr> <tr> <td>4</td> <td>Maintenance</td> <td>Operations/Maintenance</td> </tr> <tr> <td>5</td> <td>Company Vehicles</td> <td>Operations Operators/Maintenance</td> </tr> <tr> <td>6</td> <td>Confined Space Activities</td> <td>Maintenance</td> </tr> </tbody> </table>				Codes of Safe Practices			Code #	Category	Employees	1	General Safety	All employees	2	Administrative	Clerical/Management	3	Material Handling	Operations/Maintenance	4	Maintenance	Operations/Maintenance	5	Company Vehicles	Operations Operators/Maintenance	6	Confined Space Activities	Maintenance
Codes of Safe Practices																											
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5	Company Vehicles	Operations Operators/Maintenance																									
6	Confined Space Activities	Maintenance																									
<p>Employee Safety Reporting Program</p> <p><i>Describe the process and protections for employees to report safety conditions to senior management. Describe employee behaviors that may result in disciplinary action (and therefore, are excluded from protection).</i></p>																											

SunLine Transit Agency - Public Transportation Agency Safety Plan

Reporting unsafe conditions or practices is protected by law. SunLine's Safety Department will investigate any report or question regarding existing or potential hazards as required by the Injury and Illness Prevention Programs Standard (Title 8 California Code of Regulations §3203) and advise the employee who reported the information and the workers in the area it affects, of the results. Additionally, as noted in the Title 8 California Code, this is done in a manner that provides the employee a way to report without fear of reprisal.

Disciplinary actions at SunLine are based on infractions of SunLine's Rules and Regulations that are necessary for safe and efficient operations. Reporting of safety hazards does not warrant disciplinary action.

SOP #Safety 0038 – Employee Safety Suggestion Program provides employees with written forms to inform management of potential hazards or unsafe conditions and has established a suggestion box for input by employees. Below is a representation of the form.



This form is for employees who wish to provide suggestions or report an unsafe workplace condition or practice.

Description of unsafe condition or practice:



Cause of other contributing practices:

Employee suggestion for improving safety:

Has this been reported to a supervisor? Yes No

Employee Name: (Optional)

Department:

Optional reporting at SunLine's online reporting portal: <https://app.industrysafe.com/SUNLINETRA/hazards/>   QR Code

Use of this form and other reports about unsafe conditions or practices are protected by law: It is illegal for an employer to act against employees for exercising their right to communicate safety problems.

The employer will investigate any reports or questions as required by the injury and illness Prevention Program Standard (8 CCR 3203) and advise the employee who provided the information, or he workers in the area it effects or results.

SOP #Safety 0036 – Safety events Reporting & Responsibilities describes the notification procedures for reporting and disseminating information to the appropriate personnel for action; and the responsibilities for handling the situation. Generally, the procedures are as follows:

- **Driver shall:**
 - Notify Dispatch by radio immediately.
 - Be prepared to report the circumstances of the injury and/or collision and request the type of help needed, i.e., supervisor needed, police, paramedics, etc.
 - Follow any instructions given by Dispatch.
 - Maintain control of the situation until first responders or management arrives.
 - Complete **SOP #Safety 0014V10 – Operators Occurrence Report** at the scene if possible, so as to gather all of the information concerning the safety event necessary for the Safety Department to complete an investigation and analysis of the situation.
- **Supervisor shall:**
 - Be notified by the Dispatcher immediately and sent to the scene.
 - Be in charge of the injury/collision scene to be certain all SunLine procedures are followed.

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- Remain in contact with Dispatch to:
 - Ensure that emergency services/police are summoned, depending on the circumstances
 - Keep Dispatch informed of the circumstances as they occur at the scene so the necessary employees and equipment can be made available.
- **Dispatcher shall:**
 - Immediately handle the scene, by radio or phone, to ensure complete medical attention or other emergency services are contacted, and that this information is relayed to the Supervisor/Driver at the scene.
 - Notify the Deputy Chief Operations Officer – Transportation
 - Follow the instructions of any or all Department Chiefs related to all collisions, injuries, and equipment damage.
- **Deputy Chief Transportation Officer shall:**
 - Assess the circumstances of the safety event and make the determination of notifying the Chief Operations Officer or other SunLine staff as is warranted under the circumstances.
- **Chief Transportation Officer shall:**
 - Assume responsibility of notifying the Chief Safety Officer and ~~CEO/General Manager~~Accountable Executive or other SunLine staff as is warranted under the circumstances.

SOP #Safety 0037 – Safety event Alert Process describes the process for determining who to notify based upon the situation; and how the notification is to be made.

Events are categorized by type and severity level then reported to the appropriate SunLine employee.

Event Category			
Event Type	Level A	Level B	Level C
Employee Injury	Fatality or critical injury	Multiple lost time Injuries requiring transport & admission	Individual injury requiring first aid
Collision	Fatality Thermal event	Major vehicle damage (total loss) Rollover/Tip over Pedestrian contact	All types of collisions Vehicle evacuation
Passenger/3rd Party Injury	Fatality or critical injury	Injury requiring transport/admission	Injury requiring treatment/release
Assault	Fatality or critical injury Major violence on company vehicle or terminal	Injury requiring transport/treatment	Injury requiring first aid
Passengers w/ Disabilities	Fatality or critical injury	Injury requiring transport/treatment	Injury requiring first aid
Security	Bomb detonation Hijack/terrorism Bomb threat Bomb device found Weapon discharge	Theft, robbery Security event	Employee misconduct Passenger misconduct
Facility/Property Damage	Catastrophic Requiring evacuation	Major Minor system disruption	Minor Damage

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	Damage to 3 rd party facility Major system disruption		
Sleeping Children	Unresponsive	Passenger/child left unattended Missing child >2 hours	Wrong stop w/missing child <2 hours
Media Note: All media events notify FGA Communications	National media Regional media Local media		
Other Events	Labor strike (sudden walk out) Other critical event	Environmental emergency response Regulatory investigation Police investigation (criminal or arrest) Other serious event	Other minor event

Safety Event Alert Distribution List

Level A	Level B	Level C
All Parties in Level B and C Chief Executive Officer/General Manager General Counsel Chief Safety Officer Chief of Staff Chief Transportation Officer Chief Financial Officer Chief Performance Officer Chief of Human Relations Chief of Compliance/Labor Relations Chief Maintenance Officer Chief of Public Affairs	All Parties in Level C Deputy Chief Safety Officer Deputy Chief Transportation Officer Deputy Chief Maintenance Operations Controller/Assistant CFO Deputy Chief Performance Officer Deputy Chief Facilities Utilities Deputy Chief of Human Relations	Superintendent of Safety and Training Superintendent of Transportation Superintendent of Fleet Maintenance Superintendent of Facilities Maintenance Alternative Fuels Manager (if safety event involves fueling station) Superintendent of Zero Emissions Technology

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5. Safety Risk Management

Safety Risk Management Process

Describe the Safety Risk Management process, including:

- *Safety Hazard Identification: The methods or processes to identify hazards and consequences of the hazards.*
- *Safety Risk Assessment: The methods or processes to assess the safety risks associated with identified safety hazards.*
- *Safety Risk Mitigation: The methods or processes to identify mitigations or strategies necessary as a result of safety risk assessment.*

Safety Hazard Identification

The objective of SunLine's hazard identification activities is to define those conditions and faults, which have the potential for causing an safety event or safety event; and the consequences of those hazards.

Information gathered from the following sources is reviewed regularly by the Deputy Chief Safety Officer to identify potential safety hazards.

- Safety events that occur in the daily operations of the service
- Feedback from employees and customers regarding unsafe practices and/or conditions
- Alerts/notifications from the FTA regarding industry hazards
- Data and information provided by an oversight authority, including the FTA, State, or State Safety Oversight Agency having jurisdiction
- Data and information regarding exposure to infectious disease provided by the CDC or State health authority
- Safety concerns identified through Safety Assurance activities
- Feedback and/or reports from the oversight authorities regarding unsafe practices and/or conditions observed and safety alerts they may receive
- Observation of work practices, work areas and equipment for obvious or potential unsafe conditions
- Monthly facility inspections: Quarterly by Safety Committee members
- Worker safety suggestions or complaints
- Reporting of hazards by employees
- Safety event and near-miss investigations
- Review post-safety event analysis conducted by the Safety Department

To ensure that hazard identification is routinely conducted, the following Inspection Schedule has been implemented.

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Area/Item	Frequency
Chemical Storage Areas	Weekly
Facility – Thousand Palms	Monthly
Facility – Indio	Monthly
Facility - Coachella	Monthly
Storage Tanks	Monthly
Maintenance Area	Monthly
Waste Storage Area	Monthly
Waste Treatment Areas	Monthly
Bus Stops/Route	As Needed

In addition, the following SOPs have been developed and implemented to help employees identify areas and items in the workplace that may be hazardous.

- **SOP #Safety 0026 – Facility Hazard Recognition Manual**
- **SOP #Safety 0029 – Daily Safety Walkthrough Assessment**
- **SOP #Safety 0039 – Hazardous Tools and Shop Equipment Safe Work Procedures**

SOP #Safety 0040 – Safety Data Acquisition & Reporting describes how to define a safety event, the importance of data collection, how to collect the data, and the roles and responsibilities of SunLine employees in a safety event. The information obtained is used in determining causal factors and developing mitigation strategies to prevent the safety event from reoccurring or occurring.

Assessment of Safety Risk and Associated Consequences

A safety risk assessment includes an assessment of the likelihood and severity of the potential consequences of the identified hazards, taking into account existing safety risk mitigations, to determine if safety risk mitigation is necessary and to inform prioritization of safety risk mitigations.

Hazard Likelihood

Determining the likelihood that a hazard could occur is instrumental in keeping SunLine employees and customers safe, equipment and facilities in safe working order. Additionally, resources can be assigned in a more strategic manner to reduce the likelihood of hazards leading to safety events of injury, destruction of property and equipment, and safety events that could lead to fatalities.

Data used to determine the likelihood of a hazard occurring is derived from research, analysis, evaluation of safety data from the operating experience of SunLine, and/or historical safety data from similar systems.

Hazard Severity

Determining the severity of a hazard, coupled with the likelihood of the hazard occurring, provides SunLine with the data necessary to effectively manage the many potential hazards that are faced during the operation of a transit system. Which hazards to address first, how best to allocate resources, and developing an appropriate timeline to manage the identified hazards are all based on this analysis of hazard likelihood and severity.

There are four categories of hazard severity:

Category I – Catastrophic

Operating conditions are such that human error, environment, design deficiencies, element, sub-system or component failure or procedural deficiencies **may cause death or major system loss**, thereby requiring:

- Immediate cessation of the unsafe activity or operation

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- Immediate evaluation of the contributing factors
- Corrective action implemented
 - Activity/operation does not restart until corrective actions has been implemented

Category II – Critical

Operating conditions are such that human error, environment, design deficiencies, element, sub-system or component failure or procedural deficiencies **may cause severe injury or illness or major system damage** thereby requiring:

- Immediate cessation of the unsafe activity or operation
- Immediate evaluation of the contributing factors
- Corrective action implemented
 - Activity/operation does not restart until corrective actions has been implemented

Category III – Marginal

Operating conditions **may cause minor injury or illness or minor system damages** such that human error, environment, design deficiencies, sub-system or component failure or procedural deficiencies **can be counteracted or controlled without serious injury, illness or major system damage** with counseling or retraining.

Category IV – Negligible

Operating conditions are such that personnel error, environment, design deficiencies, sub-system or component failure or procedural deficiencies **may result in no, or less than minor, illness, injury or system damage**. Counseling may be required to correct situation.

Safety Committee – Safety Risk Reduction Program

Please reference Safety Risk Mitigation Register Risk Assessment – SC CY2025 for mitigation related to assaults on Transit Workers as well as vehicular and pedestrian safety events involving buses.

Safety Risk Mitigation

Mitigation of Safety Risk

SOP #Safety 0041 – Mitigation of Safety Risk describes the procedures for the mitigation of potential hazards. Generally, upon report of a potential hazard to an immediate supervisor, that supervisor shall report the hazard to the Superintendent of Facility Maintenance and the Chief Safety Officer.

Safety Committee – Safety Risk Reduction Program

Please reference Safety Risk Mitigation Register Risk Assessment – SC CY2025 for mitigation related to assaults on Transit Workers as well as vehicular and pedestrian safety events involving buses.

If the hazard has been determined by the Superintendent of Facility Maintenance and the Chief Safety Officer to fall within the Unacceptable or Undesirable category, they will notify the CEO/General Manager/Accountable Executive of the risk and their plan for mitigation. After the risk of injury has been eliminated, the Chief Safety Officer will notify the CEO/General Manager/Accountable Executive of the outcome.

Based on the Risk Likelihood and Severity Assessment, Hazard Resolution priority is based on the following criterion:

Unacceptable/Undesirable:

There hazards are considered Category 1 – Catastrophic or Category 2 – Critical in severity

- An Unacceptable risk will be corrected immediately after discovery
- An Undesirable risk is corrected within 24 hours after discovery

As soon as an unacceptable or undesirable risk has been discovered,

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- All individuals are removed from the immediate area
- Bus is immediately evacuated
- Affected work area is immediately cordoned off
- Any on/off switches are set to off
- Appropriate authorities are notified
- Appropriate measures are taken to mitigate the hazard

If the hazard is determined to be in a product pending delivery, all hazards are mitigated by the manufacturer prior to deliver to SunLine.

Acceptable With Review

An Acceptable with Review risk is considered Category 3 – Marginal severity and reviewed within 24 hours after discovery. A complete report is prepared by the Superintendent of the operations are affected for the CEO/General Manager Accountable Executive and the Chief Safety Officer.

The Chief Safety Officer shall determine resolution, if appropriate.

Acceptable Without Review

An Acceptable Without Review risk is considered a Category 4 – Negligible severity and reviewed within 24 hours after discovery. A complete report is prepared by the Chief Safety Officer for the CEO/General Manager Accountable Executive.

The condition is monitored at least once weekly and any changes are reported to the Chief Safety Officer for further review to determine if any mitigation strategies are necessary.

Risk Assessment Matrix

After a risk has been identified, the Chief Safety Officer and the Superintendent of the area of operations affected by the hazard use the Risk Assessment Matrix to evaluate the likelihood of the hazard reoccurring if an safety event relating to the hazard has occurred, or the likelihood of the hazard occurring if it has been identified before an safety event has occurred.

Using this table also requires a consideration of the:

- Consequences of the risk
- Root cause
- Affected employees
- Mitigation strategy
- Resources required for mitigation
- Cost of mitigation
- Timeline for implementing the mitigation strategy

The goal of using this evaluating table is to ensure that the hazard has been evaluated completely, and resources dedicated appropriately to reduce or eliminate the likelihood of the hazard reoccurring or causing injury or destruction of property.

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Risk Assessment Matrix		SEVERITY			
		1. Catastrophic	2. Critical	3. Marginal	4. Negligible
PROBABILITY	a. Frequent	High (1a)	High (2a)	Serious (3a)	Medium (4a)
	b. Probable	High (1b)	High (2b)	Serious (3b)	Medium (4b)
	c. Occasional	High (1c)	Serious (2c)	Medium (3c)	Low (4c)
	d. Remote	Serious (1d)	Medium (2d)	Medium (3d)	Low (4d)
	e. Improbable	Medium (1e)	Medium (2e)	Medium (3e)	Low (4e)
	f. Eliminated	Eliminated			
Resolution Requirements					
High		Unacceptable	correction required		
Serious		Undesirable	correction may be required, decision by management		
Medium		Acceptable w/ review	with review and documentation by management		
Low		Acceptable	without review		
Eliminated		Acceptable	no action needed		
Probability Level	Likelihood of event in specific item	STA*in Operating Hours	Safety Event in time	Safety Event Description	
a Frequent	Will occur frequently	< 1,000 oh	1 per month	Continuously Experienced	
b Probable	Will occur several times	1,000 – 100,000 oh	1 per year	Will likely occur	
c Occasional	Likely to occur sometimes	100,000 – 1,000,000 oh	1 per 2 years	Will occur several times	
d Remote	Unlikely but possible to occur	1,000,000 - 100,000,000	1 per 5 years	Unlikely, but can be expected to occur	
e Improbable	So unlikely, occur may not be experienced.	> 100,000,000 oh	1 per 10 years	Unlikely to occur, but possible	
f Eliminate	Risk removed / eliminated	Never	N/A	Will not occur	
Severity	1. Catastrophic	2. Critical	3. Marginal	4. Negligible	
System Disruption	> 24 hrs	12 - 24 hrs	4 – 12 hrs	< 4 hrs	
Service/ Operation	Substantial or total loss of operation	Partial shutdown of operation	Brief disruption to operation	No disruption	
People					
Financial	> \$ 1,000,000	< \$ 1,000,000	< \$ 250,000	< \$ 100,000	

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Legal and Regulatory	Significant breach of the law. Individual or company law suits.	Breach of law; report /investigation by authority. Attracts compensation/ penalties/ enforcement action	Breach of regulatory requirements; report /involvement of authority. Attracts administrative fine	Technical non-compliance. No warning received; no regulatory reporting required
Environment	Permanent impact; affects a whole region; highly sensitive environment	Lasting months; impact on an extended area, area with some environmental sensitivity	Lasting weeks; reduced area, no environmentally sensitive surroundings	Lasting days or less; limited to small area, low significance/ sensitivity
Social	Major widespread social impacts	Significant , ongoing social issues	Some impacts on local population, mostly repairable	Minor disturbance of culture/social structures
Reputation	Noticeable reputational damage; national /international public attention and repercussions	Suspected reputational damage; local/regional public concern and reactions	Limited, local impact; concern/complaints from certain groups/organizations	Minor impact, awareness/concern from specific individuals
Injury	Death (not include suicides or by natural causes)	Fracture, Severe Bleeding, Brain injury, Dismemberment	Bruising, Abrasions, Bleeding (Ambulance transport)	Bruising, Abrasions, Sprains (No Ambulance transport)
Health	Exposure with irreversible impacts with loss of quality of life of a numerous group/ population or multiple fatalities	Exposure with irreversible impact on health with loss of quality of life or single fatality	Exposure with reversible impact on health or permanent change with no disability or loss of quality of life	Exposure to health hazard resulting in symptoms requiring medical intervention, with full recovery
Safety	Severe safety event with major service disruption or loss of life, Potential Federal agency involvement, damages over \$250,000	Safety event with serious injuries, damages exceed \$100,000	Reportable safety event with over \$25,000 in damages	Safety event with minor damage
Technology	SUTA Technology infrastructure, Applications that are categorized in the BCP Critical infrastructure and system(s):			
	cannot be accessed via Primary or remote infrastructure which includes data and major fiscal loss.	has an outage, but STA can restore services at the primary or remote datacenter site in an allotted SLA timeframe. Causing Operations and fiscal loss.	has an outage, but STA can restore services at the primary or remote datacenter site in an allotted STA timeframe. Causing No Operations nor fiscal loss.	or not on list, has a brief outage that is not noticed by the users, nor affects any Operation, nor causes fiscal loss.
Information Security	A breach of patron, STA employee information, network infrastructure, security systems:			Malware or other type of Virus is

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		where PII/PCI data is exposed/ accessed by malware, virus or ransomware, an external or internal hacker, employee abusing trusted elevated permissions and breach is of non-encrypted data or cause the encryption of data causing data loss	where no PII/PCI data is exposed/accessed by malware, virus or ransomware, an external or internal hacker, employee abusing trusted elevated permissions and breach is of non-encrypted data or cause the encryption of data. Data is recoverable by backup.	where No PII/PCI data is exposed/accessed by malware, virus or ransomware, an external or internal hacker, employee abusing trusted elevated permissions and breach is of non-encrypted data information, but quickly fail-over to backup site.	identified on a PC, Server, or another network node, but does not affect any process nor accesses data, and is quickly eliminated.
	Security / Police	Criminal or terrorism attack of system resulting in death or serious bodily harm to customers. Violent attack/ terrorism at STA business unit or administrative facility with grave loss of life or significant bodily harm to multiple employees.	Non-life-threatening workplace violence safety event or significant targeted criminal damage to business unit facilities, vehicles, or STA critical infrastructure.	Suspicious package resulting in minor system delays; or trespasser (suicide) on the alignment (classified as security event).	Assault of employee or customer; minor criminal activity on system or at business unit/ administrative facility.

6. Safety Assurance

Safety Performance Monitoring and Measurement
<i>Describe activities to monitor the system for compliance with procedures for operations and maintenance.</i>
<p>Safety Design Review</p> <p>Safety reviews are held with participation of all Department Head to ensure that proposed designs comply with safety requirements. Consideration is given to such areas as:</p> <ul style="list-style-type: none"> • System interactions • Human factors • Environmental parameters • Isolation of energy sources • Materials compatibility • Use of long-term storage of critical materials • Emergency responses, egress and rescue paths • Fire sources and protection

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- Equipment layout
- Lighting requirement
- Operational requirements
- Maintenance requirements
- Document control
- Data entry
- Security requirements

Any system modifications and designs are first approved by Department Heads at weekly Chiefs Meetings where critical safety issues are addressed. The ~~CEO/General Manager~~Accountable Executive and Chief Safety Officer provide final approval of any design modification before it can be implemented.

The Chief Safety Officer is responsible for distributing all modifications to the systems and programs and ensuring their compliance with the changes.

SOP #Safety 0027 – Safety Review Process describes the process used at SunLine to review operating conditions and practices for compliance with policies and risk reduction; daily, annually, and as situations occur.

A Safety Review is triggered as hazards and risks are identified by conducting **SOP #Safety 0029 – Daily Safety Walkthrough Assessment**, employee occurrence report, policies/procedures and training techniques change; and safety event date **generated from SOP #Safety 0036 – Safety events Reporting & Responsibilities** is reviewed and reveals trends that may indicate unsafe practices.

Additionally, prior to the beginning of each fiscal year, SunLine Transit's Safety Plan is reviewed by Executive management, including Operations, Maintenance, and Administration, and revised based on the safety data collected and analyzed, concerns and complaint received from employees and passengers, and changes to policies and procedures made throughout the year.

SunLine Transit is also subject to various certifications/audits from outside agencies. They include:

California Highway Patrol (CHP)

Annual terminal inspections consisting of maintenance records, random inspections of vehicles, driver's records, training records, work schedules, and Pull Notice Program.

Inspection of Controlled Substance and Alcohol Testing (CSAT) Program

Annual inspection of all results and other records pertaining to controlled substance and alcohol use and testing.

Department of Motor Vehicles (DMV)

All operators are required to possess a VTT. Training supervisors documents all hours of training (classroom, behind the wheel, in-service). Each operator must have no less than eight (8) hours annually.

The Chief Safety Officer evaluates these certifications/audits as they happen to determine if any actions need to be taken. The information from the certifications/audits is also included part of annual Internal Safety Assessment.

Describe activities to monitor operations to identify any safety risk mitigations that may be ineffective, inappropriate, or were not implemented as intended.

Internal Safety Assessment

In addition to the activities described in Safety Design Review section of this plan, **SOP #Safety 0042 – Internal Safety Assessment** is completed on an annual basis to ensure that all organizational elements, equipment, procedures and functions are performing as intended from a system safety perspective.

The Chief Safety Officer has access to all records and reports.

The Assessment includes:

- An examination of all documentation, including trend analysis prepared since the last Assessment.
- Safety data and information is reviewed and compared to prior year data.
- Equipment, facilities, checklists and other forms are reviewed.
- Interviews are held with relevant safety personnel.
- Recommendations for corrective actions may be made as a result of the Assessment.

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Assessment Responsibility

The Chief Safety Officer is responsible for all internal safety assessments, to be completed no less frequently than annually.

Assessment Reporting

The Chief Safety Officer provides copies of the assessment reports to all Directors at the weekly Director Meeting. The assessment reports include assessment of equipment, procedures, reports and data.

Assessment Objectives and Techniques

- Verify safety program development/implementation in accordance with the program.
- Assess the effectiveness of the safety programs.
- Identify program deficiencies.
- Identify potential hazards and weaknesses in the safety programs
- Verify prior corrective actions for closure.
- Recommend improvements to the SSPP.
- Provide management with assessment of status and adequacy of the SSPP.
- Assure continuing evaluation of safety-related programs, issues, awareness and reporting.

Assessment Areas

- Staff responsibilities
- Planning
- Scheduling of inspections
- Completions of checklists
- Performance of all functions
- Notifications per the SSPP
- Reporting per the SSPP
- Corrective action plans
- Closeout of findings

Evaluation of Documentation

Agency Documentation	Departmental Documentation	Inter-Agency Documentation	Historical Documentation
<ul style="list-style-type: none"> • System Safety Program Plan • Emergency Procedures • Configuration Management Plan • Hazardous Materials Management Plan • Injury & Illness Prevention Program • Fire Codes • Drug and Alcohol Abuse Program • Hazard Identification Procedures • Safety event Procedures • Training Programs • Safety Committee Minutes 	<ul style="list-style-type: none"> • Maintenance Procedures • Training Manuals • Checklist Completion 	<ul style="list-style-type: none"> • Emergency Preparedness Plan • Facility Safety Inspection Reports • Emergency Evacuation Drill Reports 	<ul style="list-style-type: none"> • Safety event Investigations • Collision/Injury Logs • Collision and Injury Analysis Reports • Audit Reports • APTA Audit Corrective Action Matrix • Checklist Completion • Maintenance Inspections/Repairs • Chemical Inventories

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<ul style="list-style-type: none"> • Safety Concern Logs and Reports • Industrial Injury Policy and Procedures • Modified Duty Policy and Procedures 			
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Safety Committee

SOP #Safety 0018 – Safety Committee describes the responsibilities of the Safety Committee. The Safety Committee is involved in the planning, revision, and implementation of **SunLine Transit Agency’s Injury and Illness Prevention Program**.

The committee meets minimally quarterly and its primary responsibilities include:

1. Review and discuss
 - a. All safety events, occupational safety events, and causes of safety events resulting in occupational injury
 - b. Occupational illness
 - c. Exposure to hazardous substances
2. Review investigations of alleged hazardous conditions brought to the attention of any committee member.
3. Review and discuss the company’s safety record and make necessary corrections or recommendations.
4. Prepare minutes for each safety meeting, post a copy of meeting minutes on the bulletin board.
5. Conduct safety inspections to discover unsafe conditions and practices and make recommendations for their correction.
6. Conduct “good housekeeping” inspections, follow-up on recommended corrective procedures, and post results in operations and maintenance lounge.
7. Make certain that employees have and use safe tools and equipment, including personal protective equipment, and that equipment is maintained properly.
8. Report any safety hazard to the Safety Department immediately.
9. Act as an interface between the employees and the Safety Department.
10. Ensure employees follow the safety rules and report any employee who violates the safety rules.
11. Give leadership and direction in administration of safety activities by showing support for safety rules and objectives.
12. Have the necessary job knowledge relating to all machines and processes in their area of responsibility.
13. Participate in safety promotional activities to arouse and maintain interest in employees and management.
14. Prepare and make available to the affected employees, written records of the safety and health issues discussed at the committee.
15. Identifying, recommending, and analyzing (i) the effectiveness of risk-based mitigations or strategies to reduce consequences identified in the agencies’ safety risk management process; (ii) safety risk mitigations that may be ineffective, inappropriate, or were not implemented as intended; and (iii) safety deficiencies for the purposes of continuous improvement.
16. Review and approves the Agency Safety Plan and any required updates.
- 15-17. Set annual safety performance targets for the safety risk reduction program.

The Safety Committee is convened by a joint labor-management process and consists of an equal number of frontline employee representatives and management representatives.

- Chief Safety Officer – Vice Chair
- ~~Deputy Chief Safety Officer~~
- Superintendent of Safety and Training

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- Risk Manager
- Safety Manager -- Chair
- Deputy Chief of Transit Operations
- Maintenance Supervisor (Frontline Employee)
- Maintenance Mechanic (Frontline Employee)
- Fixed Route Operator (Frontline Employee)
- Field Supervisor (Frontline Employee)
- Paratransit Operator (Frontline Employee)
- Secretary of the Safety Committee (non-voting member)}

Safety Committee Procedures

Procedure #1.

The Safety Committee (SC) shall have an organizational structure that is clearly defined, including the size and composition, and will be chaired by the Safety Manager. The SC will periodically review and discuss its size and scope to determine the appropriateness of adding additional members. The Safety Committee must consist of an equal number of frontline employee representatives and management representatives. In the absence of the Safety Manager, a designated vice-chair will serve in their/his/her place.

Procedure #2.

Meeting agendas, notices, and minutes will be developed and maintained by the SC Secretary, who will ensure all relevant topics are included in the agenda. Meeting notices will be shared with all members at least one (1) week in advance. Meeting minutes will be recorded during the meeting and reviewed by the Chair before being distributed to all members. As indicated above, meeting minutes will be posted on bulletin boards.

Procedure #8-Procedure #3.

SC members will receive training related to the agency's Public Transportation Agency Safety Plan (PTASP) and the Safety Management System (SMS). Members must complete training on general competencies and standard company policies. This training will include online courses such as TSI's SMS Awareness, FEMA's IS-317 Introduction to Community Emergency Response Team (CERT), and NITI's Assault Awareness and Prevention.

Procedure #4.

The agency's compensation policy for SC members participating in meetings will include regular pay for attendance or recognition of participation as part of their regular duties, depending on the role and responsibilities of the members.

Procedure #5.

The SC will have access to technical experts, agency information, and resources to support informed decision-making. The SC Chair will facilitate the engagement of non-SC members as advisors on an as-needed basis. The SC will have access to necessary data, tools, and submissions from the transit worker safety reporting program to support its deliberations.

Procedure #6.

The SC will follow a structured decision-making process to ensure effective and transparent outcomes. A majority of SC members must be present to constitute a quorum. Decisions will be made by a simple majority vote.

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Procedure #7.

The SC will coordinate and communicate effectively with the Board of Directors and the Accountable Executive (AE). The SC may provide reports to the AE and the Board as necessary to promote two-way communication. Material updates and feedback between the SC, AE, and Board will be facilitated through scheduled briefings or written reports.

Procedure #8.

The SC will have a clear process for managing disputes to ensure smooth operations. Disputes will first be mediated by the Chair. If unresolved, disputes will be escalated to the executive team (all department Chiefs) for a final decision. The AE will not be involved in resolving SC disputes to maintain the committee's independence.

Procedure #9.

The timeline for the PTASP review, signature, and approval is as follows.

1. May – SC notice of any updates since last review/approval & comment period
2. June – Draft changes/updates based on comments received
3. July – SC review/approval of draft changes
4. August – TAC or General Counsel ASP review for further development
5. September - Refine ASP based on TAC/General Counsel notes
6. October - AE signature before PTASP is approved by the Board~~SC final review & formal approval~~
7. November - SC final review & formal approval~~AE signature before PTASP is approved by the Board~~
8. December - Board approval: present summary of review process and key changes

Safety Risk Reduction Program (SRRP)

The SRRP aims to ~~enhance safety~~ improve safety performance by reducing the number and rates of safety events, injuries, and assaults on transit workers. ~~identifying, assessing, and mitigating risks within the transit agency.~~ The program will be documented in the ASP and reviewed annually. The SRRP will be integrated into the Safety Risk Management process to ensure continuous identification, assessment, ~~and~~ mitigation, and reduction of safety events and assaults on transit workers ~~risks~~. Hazards will be regularly identified through safety event reports, employee feedback, and safety audits. Hazards will be assessed to determine potential consequences and likelihood, and risks will be prioritized based on severity and likelihood. Mitigations will be developed and implemented, such as measures to reduce visibility impairments for bus operators and installing safety features on buses. The effectiveness of mitigations will be continuously monitored and adjustments made as necessary.

The SRRP will also be integrated into the Safety Assurance component to ensure continuous improvement in safety performance. Safety performance metrics, including safety event rates, injuries, and assaults on transit workers, will be tracked. Regular audits and evaluations of the SRRP will be conducted to ensure compliance and effectiveness. Corrective actions will be implemented based on audit findings and performance data.

Please refer to Section 5 Safety Risk Management for ~~an outline of~~ how the Safety Committee has assessed and mitigated the hazards related to assaults on transit workers as well as vehicular and pedestrian safety events involving transit vehicles.

Safety Performance Targets (SPTs) and Specific Mitigation Measures

As part of the SRRP, specific Safety Performance Targets (SPTs) will be established by the SC to address key safety concerns, including assaults on transit workers and pedestrian/bus collisions. These SPTs will be reviewed and updated annually to reflect the latest data and trends (please refer to section 3 for Safety Performance Targets set by SC in SRRP). The SC will set SPTs based on a three-year rolling average of data submitted by SunLine to the National Transit Database for all modes of public transportation. The SC is not required to set an SPT if SunLine has not reported three years of data to the NTD. SunLine will monitor safety performance against annual SPTs set by the SC.

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Facilities Inspections

Facilities inspections occur no less than monthly by the Safety Department and include all operating, maintenance and administrative structures. **SOP #Safety 0026 v11 – Facilities Inspection** describes the process used to conduct a safety inspection of the facilities and equipment used in the facility.

Separate inspections of all passenger facilities such as bus stops and shelters are conducted by the Stops and Zones personnel in accordance with **SOP #Safety 0022 – Bus Stop Safety Evaluation**. Any unsafe conditions are reported to their supervisors upon discovery.

Safety inspections documents are maintained, filed and tracked in the Safety Department. Safety inspection reports are available to the CEO/General Manager/Accountable Executive and Department Heads.

Maintenance

Maintenance operating polices, plans, and procedures are routinely monitored by supervisors to assure employees are performing their maintenance functions in a safe manner. **SOP #Safety 0029 – Daily Safety Walkthrough** is a key tool used for this monitoring. Violations of practices and conditions which may cause harm to employees, property, or equipment is corrected and reported to the Safety Department.

Additionally, specific actions are taken to ensure implementation of all safety policies including, but not limited to:

The Deputy Chief Maintenance Operations Officer – Maintenance or designee checks tool calibrations on an annual basis and repairs or replaces the tool as appropriate and maintains documentation to support such checks. The Chief Safety Officer is notified of the results of such checks.

All safety related records of the Maintenance Department are maintained with copies provided to the Chief Safety Officer.

The Chief Safety Officer maintains the database of facility safety issues and evaluates that list on an annual basis to determine safety trends. Such evaluation is reported to the Superintendent of Facility Maintenance and the Chief Operations Officer – Maintenance for further action as necessary.

The Deputy Chief Maintenance Operations Officer – Maintenance maintains all safety-related records of the Maintenance Department and will provide copies of those reports to the Chief Safety Officer.

The Maintenance Department has developed a preventative maintenance schedule for vehicles, which is designed to maintain overall system safety at a maximum interval of 6,000 miles between preventive maintenance evaluations. Reported deficiencies and defects in equipment or facilities are corrected and monitored to assure satisfactory resolution. Only equipment known to be free of defects is placed into service.

Describe activities to conduct investigations of safety events, including the identification of causal factors.

The activities described in the previous section of this plan include investigations and identifying the causal factors of safety events.

Describe activities to monitor information reported through internal safety reporting programs.

SOP #Safety 0000 – Rules/Procedures Review is a methodology conducted by the Deputy Chief Safety Officer and Deputy Chiefs of the operating divisions and is used to ensure uniform, coordinated development and implementation of operating, maintenance and facility procedures.

Several of the tools described earlier in this plan are incorporated into to this process to ensure that data collected throughout SunLine is considered during this review process. Those tools include but are not limited to:

- Weekly Chiefs Meetings
- Internal Assessment
- Daily Safety Walkthrough

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- Drivers Report
- Safety Committee Reports
- Employee Safety Suggestion Program

This data is analyzed then compared to current practices and procedures to ensure that safety concerns have been addressed and procedures are being followed. Where discrepancies are identified, the Deputy Chief of the operating division in question works with supervision and employees to correct the situation.

Should changes to the current practices be required as a result of this review the following steps are taken:

- The concerns and supporting data are brought to the Chief Safety Officer for review.
- The Chief Safety Officer works with the review team to develop a solution.
- The proposed solution is then presented to the affected Department Head for review and approval.
- After Department Head approval the Chief Safety Officer presents the solution to the **CEO/General Manager Accountable Executive** for review and approval.
- After **CEO/General Manager Accountable Executive** approval the Chief Safety Officer ensures that the solution is returned to the Department Head for implementation.

This review is scheduled to be conducted annually. Throughout the year, the practices are routinely monitored. Should additional discrepancies be found between the SOP and actual practices, the Rules/Procedures is repeated when needed to correct the situation.

When necessary, SunLine hires consultants with specific areas of expertise in safety, hazardous materials handling and hazardous conditions mitigation to assist.

SunLine also stays abreast of industry safety issues and mitigations through membership in several organizations including:

- The American Public Transportation Association (APTA)
- Cal ACT
- California Transit Association
- National Safety Council
- CAL/OSHA Compliance Advisor
- Safety Compliance Alerts
- Injury Prevention Alerts
- Facility Manager Alerts
- Other specific trade organizations

In addition to their responsibilities described throughout this safety plan, SunLine's management team monitors data for trends and shares their findings throughout the organization.

CEO/General Manager Accountable Executive

- Provides oversight of all SSPP policies, recommendations, actions, and modifications.
- Delegations of responsibilities as appropriate to Department Heads and follow-up on all issues and discussions.
- Allocations/approval of funds to minimize and reduce hazards to implement valid suggestions from the Safety Committee.
- Provision of leadership and direction in the administration of safety activities by showing support for safety rules and objectives.

Chief Safety Officer

- Prioritization of the safety hazards and communication to management.
- Coordinate with the Superintendent of Facility Maintenance in Hazard Identification and Resolution.
- Manage the Hazardous Materials Business Plan with the Superintendent of Facility Maintenance.
- Track, monitor and manage the modified duty program for employees returning to work with restrictions.

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- Maintain all SunLine collision/injury files to identify and establish collision/injury trends and possible corrective actions.
- Track and maintain collision and injury log for trend analysis reports and Key Performance Indicators (KPI's).
- Track safety KPI's for all agency employees and departments.
- ~~Reports directly to the CEO/General Manager~~ **Accountable Executive** any and all issues concerning safety and security of the agency, employees, passengers, visitors, contractors and equipment.
- Investigate all SunLine Transit Agency collision and injuries for preventability.
- Submit monthly safety and security data to the National Transit Data-base.

Chief of Human Relations

- Maintain the CAL-OSHA Log 300
- Post the CAL-OSHA Log 300 (the previous years recorded safety events) in the month of February.
- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Ensure all Human Resources Department employees attend designated mandatory safety meetings.
- Attend safety meetings and support the safety message being presented by the Safety Department.
- Present Human Resources specific information as needed to reinforce the goals of SunLine safety culture.
- Track safety KPI's for the Human Resources Department staff and personnel to reduce or eliminate collision/injury trends.

Chief ~~Transportation Operations~~ Officer — ~~Transportation~~

The Operations Department is assigned the responsibility for the safe operation of paratransit and fixed route buses throughout the SunLine Service Area.

These responsibilities include:

- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Monitor adherence to safety-related operating policies, plans, rules and procedures.
 - Personnel whose safety record requires follow-up, additional training, or discipline, including discharge, are identified through the maintenance of records which indicate safety violations of rules and procedures.
 - Safety violations are reported to the Chief Safety Officer.
- Ensure all Dispatchers, Supervisors, and any other safety sensitive personnel attend safety meetings as prescribed.
- Track safety KPI's for Operations Department staff and personnel to reduce or eliminate collision/injury trends.
- Review reported safety concerns from employees/passengers on bus routes/stop in conjunction with the Director of Planning.

~~Deputy Chief Safety Officer~~

- ~~Investigate all SunLine Transit Agency collision and injuries for preventability.~~
- ~~Submit monthly safety and security data to the National Transit Data base.~~

Chief ~~Operations~~ Officer — ~~Maintenance~~ **Maintenance Officer**

The Maintenance Department has developed a preventive maintenance schedule for each system hardware element, which is designed to maintain system safety. Reported deficiencies and defects in equipment and facilities are corrected and monitored to ensure safe operations. Only equipment known to be free of safety defects is placed into service. The Maintenance Department is assigned the responsibility for the maintaining all vehicles in a safe condition.

These responsibilities include:

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- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Monitor adherence to safety-related operating and maintenance policies, plans, rules and procedures.
 - Personnel whose safety record requires follow-up, additional training, or discipline, including discharge, are identified through the maintenance of records which indicate safety violations of rules and procedures.
- Ensure all Maintenance Department employees attend designated mandatory safety meetings.
- Ensure all Maintenance Department Employees attend weekly tailgate safety meetings.
- Analyze and review safety KPI's for Maintenance Department staff and personnel to reduce or eliminate collision/injury trends.

Chief Financial Officer

- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Ensure all specifications for purchases are closely reviewed to ensure purchase of safe materials and equipment.
- Work closely with the Superintendent of Facility Maintenance to ensure all purchases are closely inspected to ensure acceptance and safe materials and equipment.
- Analyze and review safety KPI's for Finance Department staff and personnel to reduce or eliminate collision/injury trends.

Planning Manager

- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Work closely with the Safety and Operations Departments on review of route and bus stops and shelter establishment and ongoing operations.
- Analyze and review safety KPI's for Planning staff and personnel to reduce or eliminate collision/injury trends.

7. Safety Promotion

Competencies and Training

Describe the safety training program for all agency employees and contractors directly responsible for safety.

Safety Training

All training in the Training Department is performed by Transportation Safety Institute (TSI) certified instructors.

All new operators training consists of no less than forty (40) hours of classroom. Classroom consists of TSI courses:

- Bus Maneuvering and Defensive Driving
- Emergency and Safety event Handling Procedures
- Passenger Relations

These are supplemented with other courses that have been incorporated into the training as contained in the Instructors Manual.

Completion of a written examination for all course subjects is required of each student.

New operator training also consists of no less than forty (40) hours of Behind-the-Wheel training before being tested.

- All new operators are trained on all SunLine vehicles which they will be expected to operate

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- An authorized examiner of SunLine administers the road test, following Department of Motor Vehicle guidelines and is recorded on the Certificate of Driving Skill (DL170).
- All training records are kept on file in the Superintendent of Safety and Training files.

After successful completion of the classroom and Behind-the-Wheel segments of the training program, the operators begin cross training, on route, with line operators, who grade their performance on the **Training Progress Report**, which are reviewed by the Training Department.

The total time from classroom to line operator is approximately 6-8 weeks. All hours are documented on **Verification of Transit Training Form** (DL260).

The Safety Department coordinates with training and maintenance training instructors in formulating and refining training programs. Training curriculums are reevaluated for improvements after each training class has been completed. New hire operators are provided course critique sheets to evaluate the driver training course.

Continues safety training to instruct employees on methods to prevent traffic, passengers, and employee safety events is accomplished with:

- Safety meetings
- Tailgate meetings
- Special presentations or classes
- Publications
- Newsletters
- Coaching at work locations

All training on new Agency vehicles is documented and retained by the Training Department.

Dispatch received a list of those operators qualified to operate new equipment.

Initial Training and Re-training is provided as described in the following chart.

Type of Training	Frequency	Comments
Safety Training	Upon Hire	Re-training Monthly
OSHA Training	Quarterly	
Bloodborne Pathogens	Upon Hire	Re-training Annually
Right-to-Know	Upon Hire	Re-training Annually
Equipment Training	Receipt of new equipment	
Emergency Drills	Quarterly	
Fatigue Awareness	Upon Hire	
Alternative Fuel	Upon Hire	As appropriate
General/Specific Safety	Monthly (Main./Ops.)	As appropriate
Hazardous Materials	Upon Hire	As appropriate

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CNG Fueling	Upon Hire	As appropriate
Disaster Preparedness	Upon Hire	
Forklift	Upon Hire	Re-training Annually

In relation to the training in the table above, safety training for all operations transit workers and transit workers directly responsible for safety, including maintenance transit workers, includes:

- **De-escalation**
- **Safety concern identification and reporting**
- **Refresher training (as needed)**

Safety Communication

Describe processes and activities to communicate safety and safety performance information throughout the organization.

Communication Tools

SunLine uses various tools to communicate safety activities, concerns, and notices to employees. SunLine will communicate the results of cooperation with frontline transit worker representatives or the Safety Committee activities throughout SunLine's organization.

The communication tools that SunLine may use include, but are not limited to:

- Employee Safety Meetings
 - Attended by employees from Operations, Maintenance, Human Resource, Planning and Administrative Staff
- Tailgate meetings
- Newsletters
- Publications
- Posting of Safety Committee minutes throughout the organization
- Use of color codes, posters, labels or signs to warn employees of potential hazards

Safety Incentive Awards

Safety awards are used to encourage individual participation in the SSPP.

Presently the Safety Department administers Safe Driving Awards, which recognizes individual yearly miles driven safety event free by transit operators.

Our other safety incentive program is our Quarterly Safety Incentive Program that recognizes the safety achievement of employees with a prize.

Definitions of Special Terms Used in the ASP

SunLine Transit Agency incorporates all of FTA's definitions that are in 49 CFR § 673.5 of the Public Transportation Agency Safety Plan regulation.

Term	Definition
Accountable Executive	A single, identifiable person who has ultimate responsibility for carrying out the Public Transportation Agency Safety Plan of a <u>public transportation transit</u> agency; responsibility for carrying out the <u>transit</u> agency's Transit Asset Management Plan; and control or direction over the human and capital resources needed to develop and maintain both the <u>transit</u> agency's Public Transportation Agency

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	Safety Plan, in accordance with 49 U.S.C. 5329(d), and the <u>transit</u> agency's Transit Asset Management Plan, in accordance with 49 U.S.C. 5326.
<u>Assault on a transit worker</u>	<u>A circumstance in which an individual knowingly, without lawful authority or permission, and with intent to endanger the safety of any individual, or with a reckless disregard for the safety of human life, interferes with, disables, or incapacitates a transit worker while the transit worker is performing the duties of the transit worker, as defined in 49 U.S.C. 5302.</u>
Competent Person	Someone who is capable of identifying existing and predictable hazards in the surroundings or working conditions that are unsanitary, hazardous or dangerous to employees, and who has the authorization to take prompt corrective measures to eliminate them.
<u>Emergency</u>	<u>A natural disaster affecting a wide area (such as a flood, hurricane, tidal wave, earthquake, severe storm, or landslide) or a catastrophic failure from any external cause, as a result of which the Governor of a State has declared an emergency and the Secretary has concurred; or the President has declared a major disaster under section 401 of the Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 U.S.C. 5170), as defined under 49 U.S.C. 5324.</u>
Equivalent Authority/entity	An entity that carries out duties similar to that of a Board of Directors for a recipient or subrecipient of FTA funds under 49 U.S.C. Chapter 53, including sufficient authority to review and approve a recipient or subrecipient's Public Transportation Agency Safety Plan.
Hazard	Any real or potential condition that can cause injury, illness, or death; damage to or loss of the facilities, equipment, rolling stock, or infrastructure of a public transportation system; or damage to the environment.
<u>Injury</u>	<u>Any harm to persons as a result of an event that requires immediate medical attention away from the scene.</u>
Investigation	Means the process of determining the causal and contributing factors of a safety event <u>an accident, incident,</u> or hazard, for the purpose of preventing recurrence and mitigating <u>safety</u> risk.
<u>Joint labor-management process</u>	<u>A formal approach to discuss topics affecting transit workers and the public transportation system.</u>
National Public Transportation Safety Plan	The plan to improve the safety of all public transportation systems that receive Federal financial assistance under 49 U.S.C. Chapter 53.
<u>Near-miss</u>	<u>A narrowly avoided safety event.</u>
Operator	A provider of public transportation, as defined under 49 U.S.C. 5302.
Performance Measure	An expression based on a quantifiable indicator of performance or condition that is used to establish targets and to assess progress toward meeting the established targets.
Performance Target	A quantifiable level of performance or conditions, expressed as a value for the measure, to be achieved within a time period required by the FTA.
<u>Potential Consequence</u>	<u>The effect of a hazard.</u>
Agency Safety Plan	The documented comprehensive Agency Safety Plan for a transit agency that is required by 49 U.S.C. 5329 and Part 673.
Risk	The composite of predicted severity and likelihood of the potential effect of a hazard.
Risk Mitigation	A method or methods to eliminate or reduce the effects of hazards.
Safety Assurance	Processes within a transit agency's Safety Management System that function to ensure the implementation and effectiveness of safety risk mitigation, and to ensure that the transit agency meets or exceeds its safety objectives through the collection, analysis, and assessment of information.

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Safety Committee	The formal joint labor-management committee on issues related to safety that is required by 49 U.S.C. 5329 and 49 C.F.R. part 673.
Safety event	An unexpected outcome resulting in injury or death; damage to or loss of the facilities, equipment, rolling stock, or infrastructure of a public transportation system; or damage to the environment.
Safety Management Policy	A transit agency's documented commitment to safety, which defines the transit agency's safety objectives and the accountabilities and responsibilities for the management of its employees in regard to safety.
Safety Management System	The formal, top-down, organization-wide approach to managing safety risk and assuring the effectiveness of a transit agency's safety risk mitigation. SMS includes systematic procedures, practices, and policies for managing risks and hazards and safety risks.
Safety Performance Target	A quantifiable level of performance or condition, expressed as a value for the measure, performance target related to safety management activities, to be achieved within a specified time period.
Safety Promotion	A combination of training and communication of safety information to support SMS as applied to the transit agency's public transportation system.
Safety risk	The composite of predicted severity and likelihood of a potential consequence of a hazard.
Safety Risk Assessment	The formal activity whereby a transit agency determines Safety Risk Management priorities by establishing the significance or value of its safety risks.
Safety Risk Management	A process within a transit agency's Agency Safety Plan for identifying hazards and analyzing, assessing, and mitigating the safety risk of their potential consequences.
Safety risk mitigation	A method or methods to eliminate or reduce the severity and/or likelihood of a potential consequence of a hazard.
Safety set-aside	the allocation of not less than 0.75 percent of assistance received by a large urbanized area provider under 49 U.S.C. 5307 to safety-related projects eligible under 49 U.S.C. 5307.
Serious Injury	Any injury in which: (1) any injury which: (1) Requires hospitalization for more than 48 hours, commencing within 7 days from the date when the injury was received; (2) Results in a fracture of any bone (except simple fractures of fingers, toes, or noses); (3) Causes severe hemorrhages, nerve, muscle, or tendon damage; (4) Involves any internal organ; or (5) Involves second- or third-degree burns, or any burns affecting more than 5 percent of the body surface.
Transit Agency	An operator of a public transportation system that is a recipient or subrecipient of Federal financial assistance under 49 U.S.C. 5307 or a rail transit agency.
Transit Asset Management Plan	The strategic and systematic practice of procuring, operating, inspecting, maintaining, rehabilitating, and replacing transit capital assets to manage their performance, risks, and costs over their life cycles, for the purpose of providing safe, cost-effective, and reliable public transportation, as required by 49 U.S.C. 5326 and 49 CFR Part 625.
Transit worker	Any employee, contractor, or volunteer working on behalf of the transit agency.

List of Acronyms Used in the ASP

Acronym	Word or Phrase
ADA	American's with Disabilities Act of 1990
ASP	Agency Safety Plan (also referred to as a PTASP in Part 673)
CDC	<u>Centers for Disease Control and Prevention of the United States Department of Health and Human Services</u>
CFR	Code of Federal Regulations
ESRP	Employee Safety Reporting Program

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FTA	Federal Transit Administration
MPO	Metropolitan Planning Organization
<u>NTD</u>	National Transit Database
Part 673	49 CFR Part 673 (Public Transportation Agency Safety Plan)
<u>SC</u>	Safety Committee
SMS	Safety Management System
U.S.C.	United States Code
VRM	Vehicle Revenue Miles
FGA	Federal Government Agencies

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1. Transit Agency Information

Transit Agency Name	SunLine Transit Agency			
Transit Agency Address	32-505 Harry Oliver Trail, Thousand Palms, CA 92276			
Name and Title of Accountable Executive	Mona Babauta , CEO/General Manager			
Name of Chief Safety Officer or SMS Executive	Bryan Valenzuela, Chief Safety Officer			
Mode(s) of Service Covered by This Plan	Fixed Route Paratransit Microtransit	List All FTA Funding Types (e.g., 5307, 5337, 5339)	5307, 5310, 5311, 5309, 5313, 5339, CMAQ	
Mode(s) of Service Provided by the Transit Agency (Directly operated or contracted service)	Fixed Route Bus; Paratransit; Microtransit			
Does the agency provide transit services on behalf of another transit agency or entity?	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>	Description of Arrangement(s)	N/A
Name and Address of Transit Agency(ies) or Entity(ies) for Which Service Is Provided	N/A			

2. Plan Development, Approval, and Updates

Name of Entity That Drafted This Plan	Bryan Valenzuela, Chief Safety Officer, SunLine Transit Agency	
Signature by the Accountable Executive	Signature of Accountable Executive	Date of Signature
	Mona Babauta, CEO/GM	

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Approval by the Board of Directors or an Equivalent Authority	Name of Individual/Entity That Approved This Plan	Date of Approval
	SunLine Board of Directors:	
	Nancy Ross, Chair	
	Relevant Documentation (Title and Location)	
	Title 1, Division 7, Chapter 5 of the California Government Code Section 6500 et seq.	

Version Number and Updates			
<i>Record the complete history of successive versions of this plan.</i>			
Version Number	Section/Pages Affected	Reason for Change	Date Issued
1.0	All Pages	Original	9/30/2020
1.1	All Pages	Agency changes	12/07/2022
1.2	Pages 1-3, 24	Change in Accountable Executive, change in Board of Directors Chair, and revision to 49 U.S.C. § 5329 (d)	09/27/2023
1.3	All Pages	New Federal Requirements	12/04/2024

Annual Review and Update of the Agency Safety Plan
<i>Describe the process and timeline for conducting an annual review and update of the ASP.</i>
<p>SunLine’s Agency Safety Plan is reviewed annually, or at more frequent intervals as appropriate, incorporating any findings from SOP# Safety 0027 – Safety Review Process</p> <ul style="list-style-type: none"> • The update process begins at the weekly Chief’s meeting as directed by the Accountable Executive. • The Chief Safety Officer initiates the process of update. • The Safety Plan update includes a review of any safety concerns raised by staff, observed by staff, or otherwise brought to the attention of the Chiefs and the Safety Committee throughout the year; and the results of the Safety Review Process. • Each Chief with a potential safety issues is responsible for investigating the issue and recommending changes. • Any recommended changes to policies/procedures are incorporated into the Safety Plan by the Chief Safety Officer and presented at the Chiefs Meetings for review and first level approval. • The updated plan is submitted to Chiefs for review and approval. • After the updated plan has been approved by the Chiefs, the Chief Safety Officer present the Safety Plan to the Accountable Executive for approval.

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- After the Accountable Executive approves the Safety Plan, it is presented to the Safety Committee for approval.
- After the Safety Committee approves the Safety Plan, it is presented to the Board of Directors for final approval.

3. Safety Performance Targets

Safety Performance Targets Specify performance targets based on the safety performance measures established under the National Public Transportation Safety Plan.		
Event Type	Mode of Transit Service	
	Fixed Route	Paratransit
Fatalities (Total)	1	0
Fatalities (Per 100K VRM)	0.01	0
Injuries (Total)	28	6
Injuries (Per 100K VRM)	0.32	0.25
Major Events (Total)	20	3
Major Events Rate (Per 100K VRM)	0.23	0.13
Vehicle v. Vehicle Collisions Total	20	3
Collision Rate (Per 100K VRM)	0.23	0.13
System Reliability (Failures per 100K VRM)	14.20	7.39
Transit Worker Assaults (Total)	N/A	N/A
Transit Worker Assaults (Per 100K VRM)	N/A	N/A
Transit Worker Fatality Rate (Per 100K VRM)	0.00	0.00
Transit Worker Injury Rate (Per 100K VRM)	0.00	0.00
Vehicle v. Pedestrian (Total)	0	0
Vehicle v. Pedestrian (Per 100K VRM)	0.00	0.00

Safety Performance Target Coordination

Describe the coordination with the State and Metropolitan Planning Organization(s) (MPO) in the selection of State and MPO safety performance targets.

Safety Performance Targets submitted to Southern California Associated Governments (SCAG) for consultation and recommendations.

Targets Transmitted to the State	State Entity Name	Date Targets Transmitted
		California Department of Transportation
Targets Transmitted to the Metropolitan Planning Organization(s)	Metropolitan Planning Organization Name	Date Targets Transmitted
	Southern California Associated Governments	4/9/2020

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4. Safety Management Policy

<p>Safety Management Policy Statement</p> <p><i>Use the written statement of safety management policy, including safety objectives.</i></p>	
<p>At SunLine Transit Agency, safety is defined as a system-wide coordination of all departments to apply operating practices, technical management techniques, and guiding principles to preserve, life, property, and the environment.</p> <p>At the core of our commitment to safety is our drive to:</p> <ul style="list-style-type: none"> • Provide a safe working environment for our employees • Incorporate safety into our resource management decisions • Keep our passengers safe • Be good stewards of the environment <p>The Safety Management Policy is included as Appendix A.</p>	
<p>Safety Management Policy Communication</p> <p><i>Describe how the safety management policy is communicated throughout the agency. Include dates where applicable.</i></p>	
<p>Upon completion of the review process and securing final Board Approval, the Chief Safety Officer distributes the updated Safety Plan, which includes the Safety Management Policy, to each Department Chief for dissemination to staff.</p>	
<p>Authorities, Accountabilities, and Responsibilities</p> <p><i>Describe the role of the following individuals for the development and management of the transit agency's Safety Management System (SMS).</i></p>	
<p>Accountable Executive</p>	<p>The CEO/General Manager serves as SunLine's Accountable Executive with the following authorities, accountabilities, and responsibilities under this plan:</p> <ul style="list-style-type: none"> • Provide oversight of all Safety Plan policies, recommendations, actions, and modifications. • Delegation of responsibilities as appropriate to Department Heads and follow-up on all issues and discussions. • Allocation/approval of funds to minimize and reduce hazards to implement valid suggestions from the Safety Committee. • Provisions of leadership and directions in the administration of safety activities by showing support for safety rules and objectives. • Implement safety risk mitigations for the safety risk reduction program. • Consider all other safety risk mitigations recommended by the Safety Committee.
<p>Chief Safety Officer or SMS Executive</p>	<p>The Chief Safety Officer has the following authorities, accountabilities, and responsibilities under this plan:</p> <ul style="list-style-type: none"> • Informs all employees of new safety issues and regulations to ensure compliance. • Report to the nearest California Occupations Safety and Health Administration (CAL-OSHA) office of any fatal safety events, or which result in hospitalization of three or more employees.

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	<ul style="list-style-type: none"> • Prioritize the safety hazards and post in all areas used for employee communication, a list of hazards in descending order, starting with the most severe hazards first. • Coordinate with the Chief Maintenance Officer in Hazard Identification and Resolution. • Inspect all SunLine facilities on a monthly basis. • Manage the Hazardous Materials Business Plan with the Chief of Maintenance. • Coordinate contractor safety programs with the Chief of Performance. • Ensure that hazardous materials and waste are dealt with properly. • Ensure employees are warned of potential risks and dangers of hazardous materials in accordance with SOP #Safety 0028 – Hazardous Materials Communication. • Investigate every industrial injury for cause, preventability and any necessary post-safety event training. • Track, monitor and manage the modified duty program for employees returning to work with restrictions. • Establish and manage the SunLine Safety Incentive Program for all agency employees. • Maintain all SunLine collision/injury files to identify and establish collision/injury trends and possible corrective actions. • Track safety Key Performance Indicators (KPI) for all agency employees and departments. • Reports directly to the Accountable Executive of any and all issues concerning safety and security of the agency, employees, passengers, visitors, contractors and equipment. • Establish and update operating procedures and communicate them to supervisors so they may follow safety requirements. • Organize, plan and present the agency's employee safety meetings to all active employees. • Organize and schedule Safety Committee meetings in accordance with SOP #Safety 0018 – Safety Committee • Ensure the Safety Committee meeting minutes are posted for all employees to see. • Investigate all SunLine Transit Agency collisions and injuries for preventability. • Conduct post-collision, injury and safety event retraining of SunLine employees. • Submit monthly safety and security data to the National Transit Database. • Conduct monthly facility checks at all SunLine properties using SOP #Safety 0029 – Daily Safety Walkthrough Assessment Process.
<p>Agency Leadership and Executive Management</p>	<p>Agency Leadership and Executive Management also have authorities and responsibilities for day-to-day SMS implementation and operation of SunLine's SMS under this plan. SunLine Transit Agency Leadership and Executive Management include:</p> <ul style="list-style-type: none"> • Chief Transportation Officer • Chief of Human Relations • Chief Administrative Officer • Chief Planning Officer • Chief of Capital Projects • Chief Financial Officer

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	<ul style="list-style-type: none"> • Chief Maintenance Officer • Deputy Chief Facilities Officer • Deputy Chief of Human Relations • Deputy Chief Maintenance Officer • Deputy Chief of Transit Operation • Operations Managers and Supervisors • Safety, Risk, and Training Managers <p>SunLine Leadership and Executive Management personnel have the following authorities, accountabilities, and responsibilities:</p> <ul style="list-style-type: none"> • Participate as members of SunLine’s Safety Committee (operations manager and supervisors will be rotated through the Safety Committee on a one-year term and other positions are permanent members). • Complete training on SMS and SunLine’s Agency Safety Plan (ASP) elements. • Oversee day-to-day operations of the SMS in their departments. • Modify policies in their departments consistent with implementation of the SMS, as necessary. • Provide subject matter expertise to support implementation of the SMS as requested by the Accountable Executive or the Chief Safety Officer, including Safety Risk Management (SRM) activities, investigation of safety events, development of safety risk mitigations, and monitoring of mitigation effectiveness.
<p>Agency Leadership and Executive Management</p>	<p>Chief of Human Relations</p> <ul style="list-style-type: none"> • Maintain the CAL-OSHA Log 300. Post the CAL-OSHA Log 300 (the previous years recorded safety events) in the month of February. • Review SunLine’s safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable. • Ensure all employees go through hazardous materials training annually. • Ensure a new employee receives hazardous materials training within six months from the date of hire. • Securely store all health and safety records, files, etc. pertaining to each employee including items such as training signoffs and copies of medical exams & records. • Ensure all Human Resources Department employees attend designated mandatory safety meetings. • Attend safety meetings and support the safety message being presented by the Safety Department. Present Human Resources specific information as needed to reinforce the goals of SunLine safety culture. • Track safety KPI’s for the Human Resources Department staff and personnel to reduce or eliminate collision/injury trends. • Support the SunLine Safety Incentive Program by setting the example and encouraging all employees to put safety first and reduce the chances of injuries and collisions. <p>Chief Transportation Officer</p> <p>The Operations Department is assigned the responsibility for the safe operation of paratransit and fixed route buses throughout the SunLine Service Area.</p>

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These responsibilities include:

- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Prepare and implement safe operating policies, plans, rules and procedures.
- Develop required policies, plans, rules, procedures and contingency plans for safe operation reviewed by the Safety Department and approved by the Accountable Executive. Revise when needed to reflect current operating conditions.
- Provide ongoing training and testing of personnel in the proper performance of safe-related operating policies, plans, rules, and procedures.
- Overview training, testing and certification in the proper performance of all safety-related rules and procedures. This applies to both normal and emergency conditions. Provide employees with copies of safety and emergency rules, procedures, and policies that affect them.
- Monitor adherence to safety-related operating policies, plans, rules and procedures. Personnel whose safety record requires follow-up, additional training, or discipline, including discharge, are identified through the maintenance of records which indicate safety violations of rules and procedures. Safety violations are reported to the Chief Safety Officer.
- Correct conditions which have caused or have the potential to cause injury to persons or damage to property/equipment.
- Ensure all Maintenance employees attend on-going tailgate training sessions.
- Ensure all Dispatchers, Supervisors, and any other safety-sensitive personnel attend safety meetings as prescribed.
- Attend employee safety meetings and support the safety message being presented by the Operations Department and all other department with a safety message. Present operations-specific information as needed to reinforce the goals of SunLine Transit Agency safety culture.
- Track safety KPI's for Operations Department staff and personnel to reduce or eliminate collision/injury trends.
- Support the SunLine Safety Incentive Program by setting the example and encouraging all employees to put safety first and reduce the chances of injuries and collisions.
- Review reported safety concerns from employees/passengers on bus routes/stops in conjunction with the Director of Planning.

Deputy Chief of Facilities

The Maintenance Department is assigned the responsibility of maintaining all vehicles in a safe condition.

These responsibilities include:

- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Preparation and implementation of safe maintenance policies, plans, rules and procedures.
- Required policies, plans, rules and procedures for safe operation and maintenance are developed by the Maintenance Department and are approved by the Safety Department. They are revised when needed to reflect current operating conditions.
- Personnel are systematically trained, tested and certified in the proper performance of all safety-related rules and procedures. This applies to both

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	<p>normal and emergency conditions. Employees are provided with copies of safety and emergency rules, procedures, and policies that affect them.</p> <ul style="list-style-type: none"> • There is ongoing testing of personnel in the proper performance of safety-related operating and maintenance policies, plans, rules, and procedures. The Department also monitors adherence to safety-related operating and maintenance policies, plans, rules and procedures. • Personnel whose safety record requires follow-up, additional training, or discipline, including discharge, are identified through the maintenance of records which indicate safety violations of rules and procedures. Safety violations are reported to the Safety Department. Conditions are corrected which have caused or have the potential to cause injury to persons or damage to property/equipment. <p>In addition to the responsibilities listed, specific actions include:</p> <ul style="list-style-type: none"> • Act as an interface between SunLine and manufacturers, to correct any severe safety hazards related to equipment and materials. • Ensures Safety Data Sheets (SDS's) meet the requirements of SOP #Safety 0028 – Hazardous Materials Communication and that on-line subscription programs are available to all employees. • Maintain a chemical inventory that is update monthly. • Coordinate with the Chief Safety Officer to create and implement SunLine's Hazardous Materials Business Plan. • Ensure that hazardous materials and waste are dealt with properly. Monitor the areas where hazardous wastes are handled and ensure that employees actions when entering, while within and when exiting are appropriate for existing conditions. • Ensure all Maintenance Department employees attend designated mandatory safety meetings. • Ensure all Maintenance Department employees attend weekly tailgate safety meetings. • Conduct bus stop safety inspections as part of weekly cleaning and maintenance. • Attend employee safety meetings and support the safety message being presented by the Safety and Operations Departments. Present maintenance specific information as needed to reinforce the goals of SunLine Transit Agency safety culture. • Analyze and review safety KPI's for Maintenance Department staff and personnel to reduce or eliminate collision/injury trends. • Support the SunLine Safety Incentive Program by setting the example and encouraging all employees to put safety first and reduce the chances of injuries and collisions. <p>Chief Financial Officer</p> <ul style="list-style-type: none"> • Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable. • Ensure all purchases comply with applicable FTA and DOT safety requirements. • Ensure all specifications for purchases are closely reviewed to ensure purchase of safe materials and equipment. • Work closely with the Chief Maintenance Officer to ensure all purchases are closely inspected to ensure acceptance of safe materials and equipment. • Attend employee safety meetings and support the safety message being presented by the Safety and Operations Departments. Present finance specific information as needed to reinforce the goals of SunLine safety culture.
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	<ul style="list-style-type: none"> • Ensure all Finance Department employees attend designated mandatory employee safety meetings. • Participate in emergency disaster planning for the recovery of the financial disaster situation. • Analyze and review safety KPI's for Finance Department staff and personnel to reduce or eliminate collision/injury trends. • Support the SunLine Safety Incentive Program by setting the example and encouraging all employees to put safety first and reduce the chances of injuries and collisions. <p>Chief Planning Officer</p> <ul style="list-style-type: none"> • Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable. • Work closely with the Safety and Operations Departments on review of route and bus stops and shelter establishment and ongoing operations. • Attend employee safety meeting and ensure departmental staff attends meetings. • Support and enforce all safety and security policies and procedures established by the agency. • Analyze and review safety KPI's for Planning staff and personnel to reduce or eliminate collision/injury trends. • Support the SunLine Safety Incentive Program by setting the example and encouraging all employees to put safety first and reduce the chances of injuries and collisions. <p>Chief Administrative Officer</p> <ul style="list-style-type: none"> • Represent SunLine to external audiences and stakeholders, including interactions and cooperative agreements with other local governmental agencies and regional entities regarding transportation programs and services. • Primary liaison between the Accountable Executive and all SunLine staff, constituents and the Board of Directors. • Work closely with the Executive Team as part of a strong leadership team working on behalf of the Accountable Executive. • Oversee strategic consultation to the Accountable Executive on major issues affecting the agency. <p>Provide day-to-day oversight, policy direction and high-performance development for all key departments to enhance the overall customer experience of SunLine riders.</p> <p>Chief Maintenance Officer</p> <ul style="list-style-type: none"> • Authorizes the purchase of parts, equipment tools, and supplies. • Ensures compliance with local, state and federal requirements regarding maintenance-related projects. • Coordinates activities within maintenance operations to assure peak performance and productivity, as well as conformance with established or mandated external regulations and policies affecting SunLine operations; measures performance levels and goal achievement. • Facilitates and leads the department in developing and administering operating plans, policies, procedures and labor contracts. • Monitors maintenance expenditures; administers the maintenance budget; coordinates special projects. • Contributes to the Executive Team in the areas of strategic planning, setting priorities, budgeting, safety, service quality and labor relations.
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Key Staff	<p>Safety Committee Members</p> <ul style="list-style-type: none"> • Make certain that employees have and use safe tools and equipment (including personal protective equipment) and that equipment is maintained properly. • Report any safety hazard to the Safety Department immediately. • Act as an interface between the employees and the Safety Department. • Ensure employees follow the safety rules and report any employee who violates the safety rules. • Give leadership and direction in administration of safety activities by showing support for safety rules and objectives. • Have the necessary job knowledge relating to all machines and processes in their area of responsibility. • Conduct quarterly site inspections and post results in operations and maintenance lounge. • Set annual safety performance targets for Safety Risk Reduction Program. • Identify and recommend mitigations for any potential consequences identified through risk assessments, including where we did not meet targets in the safety risk reduction program. • Identify ineffective/inappropriate or poorly implemented mitigations, including where we did not meet targets in the safety risk reduction program. • Identify safety deficiencies for purposes of continuous improvements (SA), including where we did not meet targets in the safety risk reduction program. <p>All employees at SunLine Transit have a role in safety. In an effort to ensure that safety responsibilities are understood, the following chart describes the safety roles for each job classification.</p>		
	SunLine Transit Agency		
	Job Classification	Job Description/Responsibility	Applicable Codes
	Clerical	<p>Administrative Assistant, Accounting Tech, Marketing Rep., Receptionist, Customer Service:</p> <p>Tasks include computer operations, telephone, fax, filing, appointments, check processing and xeroxing.</p> <p>Equipment: Computer equipment, copier, telephone, file cabinets, postage meter, radios 10-key.</p>	1,2,5
Operations Dispatcher	<p>Dispatches motor coach operators, provides route and schedule information.</p> <p>Equipment: Radios, computer equipment, copier, telephone, typewriter and file cabinets.</p>	1,2	
Operations Operators	<p>Operates and drives a motor coach along prescribed routes.</p>	1,5	

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		Equipment: Motor coach, radios, winches, ramps and wheelchair lifts.	
	Operations Supervisor	Supervises motor coach operators to ensure schedule adherence and safe operation. Equipment: Company vehicles, radios, computer equipment, cellphone, copier, tablets (ipad) and telephone.	1,2,5
	Maintenance/Utilities	Maintains and cleans vehicles and facilities. Equipment: Vacuums, bus wash, paint, solvents, ladders, scaffolding and hoses.	1,3,4,5
	Maintenance/Property Maintainers & Supervisors	Maintains, cleans and installs bus stops. Removes graffiti, steam cleans and empties trash. Equipment: Stam cleaners, sand blasters, standard tools, ladders, solvents, paints, nails and drills.	1,3,4,5
	Maintenance/Mechanics & Supervisors	Performs vehicle repair work and diagnostic analysis. Equipment: Mechanics tools, diagnostic equipment, paint, oil and transmission fluids, welding equipment.	1,2,3,4,5
	Maintenance/Facilities	Maintains and cleans exteriors of buildings. Equipment: Lawn and garden equipment, paints, hammers.	1,3,4,5
	Maintenance/Body Technician	Performs vehicle inspections and repairs as directed. Equipment: Welding equipment, lifts, paint spray, mechanic tools, air hose, diagnostic equipment, oils and fluids.	1,3,4,5
	Maintenance/Training Supervisor & Director of Maintenance	Supervises, trains, and directs the work of mechanics and utility personnel. Equipment: Gas engines, mechanic tools, transmissions, batteries, electrical wiring, CNG, paints and welding materials.	1,2,3,4,5
	Applicable Codes		
	SOP #Safety 0025 – Codes of Safe Practice describes safety requirements for work conditions, safe work practices, and personal protective equipment. These may be used to train new employees and employees who are changing their job assignment.		

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NOTE: Codes are numbered and correspond with "Safe Practice" description.

Codes of Safe Practices		
Code #	Category	Employees
1	General Safety	All employees
2	Administrative	Clerical/Management
3	Material Handling	Operations/Maintenance
4	Maintenance	Operations/Maintenance
5	Company Vehicles	Operations Operators/Maintenance
6	Confined Space Activities	Maintenance

Employee Safety Reporting Program

Describe the process and protections for employees to report safety conditions to senior management. Describe employee behaviors that may result in disciplinary action (and therefore, are excluded from protection).

Reporting unsafe conditions or practices is protected by law. SunLine's Safety Department will investigate any report or question regarding existing or potential hazards as required by the Injury and Illness Prevention Programs Standard (Title 8 California Code of Regulations §3203) and advise the employee who reported the information and the workers in the area it affects, of the results. Additionally, as noted in the Title 8 California Code, this is done in a manner that provides the employee a way to report without fear of reprisal.

Disciplinary actions at SunLine are based on infractions of SunLine's Rules and Regulations that are necessary for safe and efficient operations. Reporting of safety hazards does not warrant disciplinary action.

SOP #Safety 0038 – Employee Safety Suggestion Program provides employees with written forms to inform management of potential hazards or unsafe conditions and has established a suggestion box for input by employees. Below is a representation of the form.

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This form is for employees who wish to provide suggestions or report an unsafe workplace condition or practice.

Description of unsafe condition or practice:

Cause of other contributing practices:

Employee suggestion for improving safety:

Has this been reported to a supervisor? Yes No

Employee Name: (Optional)

Department:

Optional reporting at SunLine's online reporting portal: <https://app.industrysafe.com/SUNLINETRA/hazards/>



QR Code

Use of this form and other reports about unsafe conditions or practices are protected by law: It is illegal for an employer to act against employees for exercising their right to communicate safety problems.

The employer will investigate any reports or questions as required by the injury and illness Prevention Program Standard (8 CCR 3203) and advise the employee who provided the information, or the workers in the area it effects or results.

SOP #Safety 0036 – Safety events Reporting & Responsibilities describes the notification procedures for reporting and disseminating information to the appropriate personnel for action; and the responsibilities for handling the situation. Generally, the procedures are as follows:

- **Driver shall:**
 - Notify Dispatch by radio immediately.
 - Be prepared to report the circumstances of the injury and/or collision and request the type of help needed, i.e., supervisor needed, police, paramedics, etc.
 - Follow any instructions given by Dispatch.
 - Maintain control of the situation until first responders or management arrives.
 - Complete **SOP #Safety 0014V10 – Operators Occurrence Report** at the scene if possible, so as to gather all of the information concerning the safety event necessary for the Safety Department to complete an investigation and analysis of the situation.
- **Supervisor shall:**
 - Be notified by the Dispatcher immediately and sent to the scene.
 - Be in charge of the injury/collision scene to be certain all SunLine procedures are followed.
 - Remain in contact with Dispatch to:
 - Ensure that emergency services/police are summoned, depending on the circumstances
 - Keep Dispatch informed of the circumstances as they occur at the scene so the necessary employees and equipment can be made available.
- **Dispatcher shall:**
 - Immediately handle the scene, by radio or phone, to ensure complete medical attention or other emergency services are contacted, and that this information is relayed to the Supervisor/Driver at the scene.
 - Notify the Deputy Chief Operations Officer – Transportation
 - Follow the instructions of any or all Department Chiefs related to all collisions, injuries, and equipment damage.
- **Deputy Chief Transportation Officer shall:**

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- Assess the circumstances of the safety event and make the determination of notifying the Chief Operations Officer or other SunLine staff as is warranted under the circumstances.
- **Chief Transportation Officer shall:**
 - Assume responsibility of notifying the Chief Safety Officer and Accountable Executive or other SunLine staff as is warranted under the circumstances.

SOP #Safety 0037 – Safety event Alert Process describes the process for determining who to notify based upon the situation; and how the notification is to be made.

Events are categorized by type and severity level then reported to the appropriate SunLine employee.

Event Category			
Event Type	Level A	Level B	Level C
Employee Injury	Fatality or critical injury	Multiple lost time Injuries requiring transport & admission	Individual injury requiring first aid
Collision	Fatality Thermal event	Major vehicle damage (total loss) Rollover/Tip over Pedestrian contact	All types of collisions Vehicle evacuation
Passenger/3rd Party Injury	Fatality or critical injury	Injury requiring transport/admission	Injury requiring treatment/release
Assault	Fatality or critical injury Major violence on company vehicle or terminal	Injury requiring transport/treatment	Injury requiring first aid
Passengers w/ Disabilities	Fatality or critical injury	Injury requiring transport/treatment	Injury requiring first aid
Security	Bomb detonation Hijack/terrorism Bomb threat Bomb device found Weapon discharge	Theft, robbery Security event	Employee misconduct Passenger misconduct
Facility/Property Damage	Catastrophic Requiring evacuation Damage to 3 rd party facility Major system disruption	Major Minor system disruption	Minor Damage
Sleeping Children	Unresponsive	Passenger/child left unattended Missing child >2 hours	Wrong stop w/missing child <2 hours
Media Note: All media events notify FGA Communications	National media Regional media Local media		
Other Events	Labor strike (sudden walk out)	Environmental emergency response	Other minor event

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	Other critical event	Regulatory investigation Police investigation (criminal or arrest) Other serious event	
Safety Event Alert Distribution List			
Level A	Level B	Level C	
All Parties in Level B and C Chief Executive Officer/General Manager General Counsel Chief Safety Officer Chief of Staff Chief Transportation Officer Chief Financial Officer Chief Performance Officer Chief of Human Relations Chief of Compliance/Labor Relations Chief Maintenance Officer Chief of Public Affairs	All Parties in Level C Deputy Chief Safety Officer Deputy Chief Transportation Officer Deputy Chief Maintenance Operations Controller/Assistant CFO Deputy Chief Performance Officer Deputy Chief Facilities Utilities Deputy Chief of Human Relations	Superintendent of Safety and Training Superintendent of Transportation Superintendent of Fleet Maintenance Superintendent of Facilities Maintenance Alternative Fuels Manager (if safety event involves fueling station) Superintendent of Zero Emissions Technology	

5. Safety Risk Management

<p>Safety Risk Management Process</p> <p><i>Describe the Safety Risk Management process, including:</i></p> <ul style="list-style-type: none"> • <i>Safety Hazard Identification: The methods or processes to identify hazards and consequences of the hazards.</i> • <i>Safety Risk Assessment: The methods or processes to assess the safety risks associated with identified safety hazards.</i> • <i>Safety Risk Mitigation: The methods or processes to identify mitigations or strategies necessary as a result of safety risk assessment.</i>
<p><u>Safety Hazard Identification</u></p> <p>The objective of SunLine’s hazard identification activities is to define those conditions and faults, which have the potential for causing an safety event or safety event; and the consequences of those hazards.</p> <p>Information gathered from the following sources is reviewed regularly by the Deputy Chief Safety Officer to identify potential safety hazards.</p> <ul style="list-style-type: none"> • Safety events that occur in the daily operations of the service

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- Feedback from employees and customers regarding unsafe practices and/or conditions
- Alerts/notifications from the FTA regarding industry hazards
- Data and information provided by an oversight authority, including the FTA, State, or State Safety Oversight Agency having jurisdiction
- Data and information regarding exposure to infectious disease provided by the CDC or State health authority
- Safety concerns identified through Safety Assurance activities
- Feedback and/or reports from the oversight authorities regarding unsafe practices and/or conditions observed and safety alerts they may receive
- Observation of work practices, work areas and equipment for obvious or potential unsafe conditions
- Monthly facility inspections: Quarterly by Safety Committee members
- Worker safety suggestions or complaints
- Reporting of hazards by employees
- Safety event and near-miss investigations
- Review post-safety event analysis conducted by the Safety Department

To ensure that hazard identification is routinely conducted, the following Inspection Schedule has been implemented.

Area/Item	Frequency
Chemical Storage Areas	Weekly
Facility – Thousand Palms	Monthly
Facility – Indio	Monthly
Facility - Coachella	Monthly
Storage Tanks	Monthly
Maintenance Area	Monthly
Waste Storage Area	Monthly
Waste Treatment Areas	Monthly
Bus Stops/Route	As Needed

In addition, the following SOPs have been developed and implemented to help employees identify areas and items in the workplace that may be hazardous.

- **SOP #Safety 0026 – Facility Hazard Recognition Manual**
- **SOP #Safety 0029 – Daily Safety Walkthrough Assessment**
- **SOP #Safety 0039 – Hazardous Tools and Shop Equipment Safe Work Procedures**

SOP #Safety 0040 – Safety Data Acquisition & Reporting describes how to define a safety event, the importance of data collection, how to collect the data, and the roles and responsibilities of SunLine employees in a safety event. The information obtained is used in determining causal factors and developing mitigation strategies to prevent the safety event from reoccurring or occurring.

Assessment of Safety Risk and Associated Consequences

A safety risk assessment includes an assessment of the likelihood and severity of the potential consequences of the identified hazards, taking into account existing safety risk mitigations, to determine if safety risk mitigation is necessary and to inform prioritization of safety risk mitigations.

Hazard Likelihood

Determining the likelihood that a hazard could occur is instrumental in keeping SunLine employees and customers safe, equipment and facilities in safe working order. Additionally, resources can be assigned in a

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more strategic manner to reduce the likelihood of hazards leading to safety events of injury, destruction of property and equipment, and safety events that could lead to fatalities.

Data used to determine the likelihood of a hazard occurring is derived from research, analysis, evaluation of safety data from the operating experience of SunLine, and/or historical safety data from similar systems.

Hazard Severity

Determining the severity of a hazard, coupled with the likelihood of the hazard occurring, provides SunLine with the data necessary to effectively manage the many potential hazards that are faced during the operation of a transit system. Which hazards to address first, how best to allocate resources, and developing an appropriate timeline to manage the identified hazards are all based on this analysis of hazard likelihood and severity.

There are four categories of hazard severity:

Category I – Catastrophic

Operating conditions are such that human error, environment, design deficiencies, element, sub-system or component failure or procedural deficiencies **may cause death or major system loss**, thereby requiring:

- Immediate cessation of the unsafe activity or operation
- Immediate evaluation of the contributing factors
- Corrective action implemented
 - Activity/operation does not restart until corrective actions has been implemented

Category II – Critical

Operating conditions are such that human error, environment, design deficiencies, element, sub-system or component failure or procedural deficiencies **may cause severe injury or illness or major system damage** thereby requiring:

- Immediate cessation of the unsafe activity or operation
- Immediate evaluation of the contributing factors
- Corrective action implemented
 - Activity/operation does not restart until corrective actions has been implemented

Category III – Marginal

Operating conditions **may cause minor injury or illness or minor system damages** such that human error, environment, design deficiencies, sub-system or component failure or procedural deficiencies **can be counteracted or controlled without serious injury, illness or major system damage** with counseling or retraining.

Category IV – Negligible

Operating conditions are such that personnel error, environment, design deficiencies, sub-system or component failure or procedural deficiencies **may result in no, or less than minor, illness, injury or system damage**. Counseling may be required to correct situation.

Safety Committee – Safety Risk Reduction Program

Please reference Safety Risk Mitigation Register *Risk Assessment – SC CY2025* for mitigation related to assaults on Transit Workers as well as vehicular and pedestrian safety events involving buses.

Safety Risk Mitigation

Mitigation of Safety Risk

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SOP #Safety 0041 – Mitigation of Safety Risk describes the procedures for the mitigation of potential hazards. Generally, upon report of a potential hazard to an immediate supervisor, that supervisor shall report the hazard to the Superintendent of Facility Maintenance and the Chief Safety Officer.

If the hazard has been determined by the Superintendent of Facility Maintenance and the Chief Safety Officer to fall within the Unacceptable or Undesirable category, they will notify the Accountable Executive of the risk and their plan for mitigation. After the risk of injury has been eliminated, the Chief Safety Officer will notify the Accountable Executive of the outcome.

Based on the Risk Likelihood and Severity Assessment, Hazard Resolution priority is based on the following criterion:

Unacceptable/Undesirable:

These hazards are considered Category 1 – Catastrophic or Category 2 – Critical in severity

- An Unacceptable risk will be corrected immediately after discovery
- An Undesirable risk is corrected within 24 hours after discovery

As soon as an unacceptable or undesirable risk has been discovered,

- All individuals are removed from the immediate area
- Bus is immediately evacuated
- Affected work area is immediately cordoned off
- Any on/off switches are set to off
- Appropriate authorities are notified
- Appropriate measures are taken to mitigate the hazard

If the hazard is determined to be in a product pending delivery, all hazards are mitigated by the manufacturer prior to deliver to SunLine.

Acceptable With Review

An Acceptable with Review risk is considered Category 3 – Marginal severity and reviewed within 24 hours after discovery. A complete report is prepared by the Superintendent of the operations are affected for the Accountable Executive and the Chief Safety Officer.

The Chief Safety Officer shall determine resolution, if appropriate.

Acceptable Without Review

An Acceptable Without Review risk is considered a Category 4 – Negligible severity and reviewed within 24 hours after discovery. A complete report is prepared by the Chief Safety Officer for the Accountable Executive.

The condition is monitored at least once weekly and any changes are reported to the Chief Safety Officer for further review to determine if any mitigation strategies are necessary.

Risk Assessment Matrix

After a risk has been identified, the Chief Safety Officer and the Superintendent of the area of operations affected by the hazard use the Risk Assessment Matrix to evaluate the likelihood of the hazard reoccurring if an safety event relating to the hazard has occurred, or the likelihood of the hazard occurring if it has been identified before an safety event has occurred.

Using this table also requires a consideration of the:

- Consequences of the risk
- Root cause
- Affected employees
- Mitigation strategy
- Resources required for mitigation

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- Cost of mitigation
- Timeline for implementing the mitigation strategy

The goal of using this evaluating table is to ensure that the hazard has been evaluated completely, and resources dedicated appropriately to reduce or eliminate the likelihood of the hazard reoccurring or causing injury or destruction of property.

Risk Assessment Matrix		SEVERITY			
		1. Catastrophic	2. Critical	3. Marginal	4. Negligible
PROBABILITY	a. Frequent	High (1a)	High (2a)	Serious (3a)	Medium (4a)
	b. Probable	High (1b)	High (2b)	Serious (3b)	Medium (4b)
	c. Occasional	High (1c)	Serious (2c)	Medium (3c)	Low (4c)
	d. Remote	Serious (1d)	Medium (2d)	Medium (3d)	Low (4d)
	e. Improbable	Medium (1e)	Medium (2e)	Medium (3e)	Low (4e)
	f. Eliminated	Eliminated			
Resolution Requirements					
High		Unacceptable	correction required		
Serious		Undesirable	correction may be required, decision by management		
Medium		Acceptable w/ review	with review and documentation by management		
Low		Acceptable	without review		
Eliminated		Acceptable	no action needed		
Probability Level	Likelihood of event in specific item	STA*in Operating Hours	Safety Event in time	Safety Event Description	
a Frequent	Will occur frequently	< 1,000 oh	1 per month	Continuously Experienced	
b Probable	Will occur several times	1,000 – 100,000 oh	1 per year	Will likely occur	
c Occasional	Likely to occur sometimes	100,000 – 1,000,000 oh	1 per 2 years	Will occur several times	
d Remote	Unlikely but possible to occur	1,000,000 - 100,000,000	1 per 5 years	Unlikely, but can be expected to occur	
e Improbable	So unlikely, occur may not be experienced.	> 100,000,000 oh	1 per 10 years	Unlikely to occur, but possible	
f Eliminate	Risk removed / eliminated	Never	N/A	Will not occur	
Severity		1. Catastrophic	2. Critical	3. Marginal	4. Negligible

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System Disruption	> 24 hrs	12 - 24 hrs	4 – 12 hrs	< 4 hrs
Service/ Operation	Substantial or total loss of operation	Partial shutdown of operation	Brief disruption to operation	No disruption
People				
Financial	> \$ 1,000,000	< \$ 1,000,000	< \$ 250,000	< \$ 100,000
Legal and Regulatory	Significant breach of the law. Individual or company law suits.	Breach of law; report /investigation by authority. Attracts compensation/ penalties/ enforcement action	Breach of regulatory requirements; report /involvement of authority. Attracts administrative fine	Technical non-compliance. No warning received; no regulatory reporting required
Environment	Permanent impact; affects a whole region; highly sensitive environment	Lasting months; impact on an extended area, area with some environmental sensitivity	Lasting weeks; reduced area, no environmentally sensitive surroundings	Lasting days or less; limited to small area, low significance/ sensitivity
Social	Major widespread social impacts	Significant , ongoing social issues	Some impacts on local population, mostly repairable	Minor disturbance of culture/social structures
Reputation	Noticeable reputational damage; national /international public attention and repercussions	Suspected reputational damage; local/regional public concern and reactions	Limited, local impact; concern/complaints from certain groups/organizations	Minor impact, awareness/concern from specific individuals
Injury	Death (not include suicides or by natural causes)	Fracture, Severe Bleeding, Brain injury, Dismemberment	Bruising, Abrasions, Bleeding (Ambulance transport)	Bruising, Abrasions, Sprains (No Ambulance transport)
Health	Exposure with irreversible impacts with loss of quality of life of a numerous group/ population or multiple fatalities	Exposure with irreversible impact on health with loss of quality of life or single fatality	Exposure with reversible impact on health or permanent change with no disability or loss of quality of life	Exposure to health hazard resulting in symptoms requiring medical intervention, with full recovery
Safety	Severe safety event with major service disruption or loss of life, Potential Federal agency involvement, damages over \$250,000	Safety event with serious injuries, damages exceed \$100,000	Reportable safety event with over \$25,000 in damages	Safety event with minor damage
Technology	STA Technology infrastructure, Applications that are categorized in the BCP Critical infrastructure and system(s):			
	cannot be accessed via Primary or remote infrastructure which includes data and major fiscal loss.	has an outage, but STA can restore services at the primary or remote datacenter site in an allotted SLA	has an outage, but STA can restore services at the primary or remote datacenter site in an allotted STA	or not on list, has a brief outage that is not noticed by the users, nor affects any

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			timeframe. Causing Operations and fiscal loss.	timeframe. Causing No Operations nor fiscal loss.	Operation, nor causes fiscal loss.
Information Security	A breach of patron, STA employee information, network infrastructure, security systems:				Malware or other type of Virus is identified on a PC, Server, or another network node, but does not affect any process nor accesses data, and is quickly eliminated.
	where PII/PCI data is exposed/ accessed by malware, virus or ransomware, an external or internal hacker, employee abusing trusted elevated permissions and breach is of non-encrypted data or cause the encryption of data causing data loss	where no PII/PCI data is exposed/accessed by malware, virus or ransomware, an external or internal hacker, employee abusing trusted elevated permissions and breach is of non-encrypted data or cause the encryption of data. Data is recoverable by backup.	where No PII/PCI data is exposed/accessed by malware, virus or ransomware, an external or internal hacker, employee abusing trusted elevated permissions and breach is of non-encrypted data information, but quickly fail-over to backup site.		
Security / Police	Criminal or terrorism attack of system resulting in death or serious bodily harm to customers. Violent attack/ terrorism at STA business unit or administrative facility with grave loss of life or significant bodily harm to multiple employees.	Non-life-threatening workplace violence safety event or significant targeted criminal damage to business unit facilities, vehicles, or STA critical infrastructure.	Suspicious package resulting in minor system delays; or trespasser (suicide) on the alignment (classified as security event).	Assault of employee or customer; minor criminal activity on system or at business unit/ administrative facility.	

6. Safety Assurance

Safety Performance Monitoring and Measurement
<i>Describe activities to monitor the system for compliance with procedures for operations and maintenance.</i>
Safety Design Review
<p>Safety reviews are held with participation of all Department Head to ensure that proposed designs comply with safety requirements. Consideration is given to such areas as:</p> <ul style="list-style-type: none"> • System interactions • Human factors

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- Environmental parameters
- Isolation of energy sources
- Materials compatibility
- Use of long-term storage of critical materials
- Emergency responses, egress and rescue paths
- Fire sources and protection
- Equipment layout
- Lighting requirement
- Operational requirements
- Maintenance requirements
- Document control
- Data entry
- Security requirements

Any system modifications and designs are first approved by Department Heads at weekly Chiefs Meetings where critical safety issues are addressed. The Accountable Executive and Chief Safety Officer provide final approval of any design modification before it can be implemented.

The Chief Safety Officer is responsible for distributing all modifications to the systems and programs and ensuring their compliance with the changes.

SOP #Safety 0027 – Safety Review Process describes the process used at SunLine to review operating conditions and practices for compliance with policies and risk reduction; daily, annually, and as situations occur.

A Safety Review is triggered as hazards and risks are identified by conducting **SOP #Safety 0029 – Daily Safety Walkthrough Assessment**, employee occurrence report, policies/procedures and training techniques change; and safety event date **generated from SOP #Safety 0036 – Safety events Reporting & Responsibilities** is reviewed and reveals trends that may indicate unsafe practices.

Additionally, prior to the beginning of each fiscal year, SunLine Transit's Safety Plan is reviewed by Executive management, including Operations, Maintenance, and Administration, and revised based on the safety data collected and analyzed, concerns and complaint received from employees and passengers, and changes to policies and procedures made throughout the year.

SunLine Transit is also subject to various certifications/audits from outside agencies. They include:

California Highway Patrol (CHP)

Annual terminal inspections consisting of maintenance records, random inspections of vehicles, driver's records, training records, work schedules, and Pull Notice Program.

Inspection of Controlled Substance and Alcohol Testing (CSAT) Program

Annual inspection of all results and other records pertaining to controlled substance and alcohol use and testing.

Department of Motor Vehicles (DMV)

All operators are required to possess a VTT. Training supervisors documents all hours of training (classroom, behind the wheel, in-service). Each operator must have no less than eight (8) hours annually.

The Chief Safety Officer evaluates these certifications/audits as they happen to determine if any actions need to be taken. The information from the certifications/audits is also included part of annual Internal Safety Assessment.

Describe activities to monitor operations to identify any safety risk mitigations that may be ineffective, inappropriate, or were not implemented as intended.

Internal Safety Assessment

In addition to the activities described in Safety Design Review section of this plan, **SOP #Safety 0042 – Internal Safety Assessment** is completed on an annual basis to ensure that all organizational elements, equipment, procedures and functions are performing as intended from a system safety perspective.

The Chief Safety Officer has access to all records and reports.

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The Assessment includes:

- An examination of all documentation, including trend analysis prepared since the last Assessment.
- Safety data and information is reviewed and compared to prior year data.
- Equipment, facilities, checklists and other forms are reviewed.
- Interviews are held with relevant safety personnel.
- Recommendations for corrective actions may be made as a result of the Assessment.

Assessment Responsibility

The Chief Safety Officer is responsible for all internal safety assessments, to be completed no less frequently than annually.

Assessment Reporting

The Chief Safety Officer provides copies of the assessment reports to all Directors at the weekly Director Meeting. The assessment reports include assessment of equipment, procedures, reports and data.

Assessment Objectives and Techniques

- Verify safety program development/implementation in accordance with the program.
- Assess the effectiveness of the safety programs.
- Identify program deficiencies.
- Identify potential hazards and weaknesses in the safety programs
- Verify prior corrective actions for closure.
- Recommend improvements to the SSPP.
- Provide management with assessment of status and adequacy of the SSPP.
- Assure continuing evaluation of safety-related programs, issues, awareness and reporting.

Assessment Areas

- Staff responsibilities
- Planning
- Scheduling of inspections
- Completions of checklists
- Performance of all functions
- Notifications per the SSPP
- Reporting per the SSPP
- Corrective action plans
- Closeout of findings

Evaluation of Documentation

Agency Documentation	Departmental Documentation	Inter-Agency Documentation	Historical Documentation
<ul style="list-style-type: none"> • System Safety Program Plan • Emergency Procedures • Configuration Management Plan • Hazardous Materials Management Plan • Injury & Illness Prevention Program • Fire Codes 	<ul style="list-style-type: none"> • Maintenance Procedures • Training Manuals • Checklist Completion 	<ul style="list-style-type: none"> • Emergency Preparedness Plan • Facility Safety Inspection Reports • Emergency Evacuation Drill Reports 	<ul style="list-style-type: none"> • Safety event Investigations • Collision/Injury Logs • Collision and Injury Analysis Reports • Audit Reports • APTA Audit Corrective Action Matrix

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<ul style="list-style-type: none"> • Drug and Alcohol Abuse Program • Hazard Identification Procedures • Safety event Procedures • Training Programs • Safety Committee Minutes • Safety Concern Logs and Reports • Industrial Injury Policy and Procedures • Modified Duty Policy and Procedures 			<ul style="list-style-type: none"> • Checklist Completion • Maintenance Inspections/Repairs • Chemical Inventories
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Safety Committee

SOP #Safety 0018 – Safety Committee describes the responsibilities of the Safety Committee. The Safety Committee is involved in the planning, revision, and implementation of **SunLine Transit Agency’s Injury and Illness Prevention Program**.

The committee meets minimally quarterly and its primary responsibilities include:

1. Review and discuss
 - a. All safety events, occupational safety events, and causes of safety events resulting in occupational injury
 - b. Occupational illness
 - c. Exposure to hazardous substances
2. Review investigations of alleged hazardous conditions brought to the attention of any committee member.
3. Review and discuss the company’s safety record and make necessary corrections or recommendations.
4. Prepare minutes for each safety meeting, post a copy of meeting minutes on the bulletin board.
5. Conduct safety inspections to discover unsafe conditions and practices and make recommendations for their correction.
6. Conduct “good housekeeping” inspections, follow-up on recommended corrective procedures, and post results in operations and maintenance lounge.
7. Make certain that employees have and use safe tools and equipment, including personal protective equipment, and that equipment is maintained properly.
8. Report any safety hazard to the Safety Department immediately.
9. Act as an interface between the employees and the Safety Department.
10. Ensure employees follow the safety rules and report any employee who violates the safety rules.
11. Give leadership and direction in administration of safety activities by showing support for safety rules and objectives.
12. Have the necessary job knowledge relating to all machines and processes in their area of responsibility.
13. Participate in safety promotional activities to arouse and maintain interest in employees and management.
14. Prepare and make available to the affected employees, written records of the safety and health issues discussed at the committee.
15. Identifying, recommending, and analyzing (i) the effectiveness of risk-based mitigations or strategies to reduce consequences identified in the agencies’ safety risk management process; (ii) safety risk mitigations that may

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be ineffective, inappropriate, or were not implemented as intended; and (iii) safety deficiencies for the purposes of continuous improvement.

16. Review and approves the Agency Safety Plan and any required updates.

17. Set annual safety performance targets for the safety risk reduction program.

The Safety Committee is convened by a joint labor-management process and consists of an equal number of frontline employee representatives and management representatives.

- Chief Safety Officer – Vice Chair
- Superintendent of Safety and Training
- Risk Manager
- Safety Manager – Chair
- Deputy Chief of Transit Operations
- Maintenance Supervisor (Frontline Employee)
- Maintenance Mechanic (Frontline Employee)
- Fixed Route Operator (Frontline Employee)
- Field Supervisor (Frontline Employee)
- Paratransit Operator (Frontline Employee)
- Secretary of the Safety Committee (non-voting member)

Safety Committee Procedures

Procedure #1.

The Safety Committee (SC) shall have an organizational structure that is clearly defined, including the size and composition, and will be chaired by the Safety Manager. The SC will periodically review and discuss its size and scope to determine the appropriateness of adding additional members. The SC must consist of an equal number of frontline employee representatives and management representatives. In the absence of the Safety Manager, a designated vice-chair will serve in their place.

Procedure #2.

Meeting agendas, notices, and minutes will be developed and maintained by the SC Secretary, who will ensure all relevant topics are included in the agenda. Meeting notices will be shared with all members at least one (1) week in advance. Meeting minutes will be recorded during the meeting and reviewed by the Chair before being distributed to all members. As indicated above, meeting minutes will be posted on bulletin boards.

Procedure #3.

SC members will receive training related to the agency's Public Transportation Agency Safety Plan (PTASP) and the Safety Management System (SMS). Members must complete training on general competencies and standard company policies. This training will include online courses such as TSI's SMS Awareness, FEMA's IS-317 Introduction to Community Emergency Response Team (CERT), and NTI's Assault Awareness and Prevention.

Procedure #4.

The agency's compensation policy for SC members participating in meetings will include regular pay for attendance or recognition of participation as part of their regular duties, depending on the role and responsibilities of the members.

Procedure #5.

The SC will have access to technical experts, agency information, and resources to support informed decision-making. The SC Chair will facilitate the engagement of non-SC members as advisors on an as-needed basis. The SC will have

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access to necessary data, tools, and submissions from the transit worker safety reporting program to support its deliberations.

Procedure #6.

The SC will follow a structured decision-making process to ensure effective and transparent outcomes. A majority of SC members must be present to constitute a quorum. Decisions will be made by a simple majority vote.

Procedure #7.

The SC will coordinate and communicate effectively with the Board of Directors and the Accountable Executive (AE). The SC may provide reports to the AE and the Board as necessary to promote two-way communication. Material updates and feedback between the SC, AE, and Board will be facilitated through scheduled briefings or written reports.

Procedure #8.

The SC will have a clear process for managing disputes to ensure smooth operations. Disputes will first be mediated by the Chair. If unresolved, disputes will be escalated to the executive team (all department Chiefs) for a final decision. The AE will not be involved in resolving SC disputes to maintain the committee's independence.

Procedure #9.

The timeline for the PTASP review, signature, and approval is as follows.

1. May – SC notice of any updates since last review/approval & comment period
2. June – Draft changes/updates based on comments received
3. July – SC review/approval of draft changes
4. August – TAC or General Counsel ASP review for further development
5. September - Refine ASP based on TAC/General Counsel notes
6. October - AE signature before PTASP is approved by the Board
7. November - SC final review & formal approval
8. December - Board approval: present summary of review process and key changes

Safety Risk Reduction Program (SRRP)

The SRRP aims to improve safety performance by reducing the number and rates of safety events, injuries, and assaults on transit workers. The program will be documented in the ASP and reviewed annually. The SRRP will be integrated into the Safety Risk Management process to ensure continuous identification, assessment, mitigation, and reduction of safety events and assaults on transit workers. Hazards will be regularly identified through safety event reports, employee feedback, and safety audits. Hazards will be assessed to determine potential consequences and likelihood, and risks will be prioritized based on severity and likelihood. Mitigations will be developed and implemented, such as measures to reduce visibility impairments for bus operators and installing safety features on buses. The effectiveness of mitigations will be continuously monitored and adjustments made as necessary.

The SRRP will also be integrated into the Safety Assurance component to ensure continuous improvement in safety performance. Safety performance metrics, including safety event rates, injuries, and assaults on transit workers, will be tracked. Regular audits and evaluations of the SRRP will be conducted to ensure compliance and effectiveness. Corrective actions will be implemented based on audit findings and performance data.

Please refer to Section 5 Safety Risk Management for how the Safety Committee has assessed and mitigated the hazards related to assaults on transit workers as well as vehicular and pedestrian safety events involving transit vehicles.

Safety Performance Targets (SPTs) and Specific Mitigation Measures

As part of the SRRP, specific Safety Performance Targets (SPTs) will be established by the SC to address key safety concerns, including assaults on transit workers and pedestrian/bus collisions. These SPTs will be reviewed and updated annually to reflect the latest data and trends (please refer to section 3 for Safety Performance Targets set by SC in

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SRRP). The SC will set SPTs based on a three-year rolling average of data submitted by SunLine to the National Transit Database for all modes of public transportation. The SC is not required to set an SPT if SunLine has not reported three years of data to the NTD. SunLine will monitor safety performance against annual SPTs set by the SC.

Facilities Inspections

Facilities inspections occur no less than monthly by the Safety Department and include all operating, maintenance and administrative structures. **SOP #Safety 0026 v11 – Facilities Inspection** describes the process used to conduct a safety inspection of the facilities and equipment used in the facility.

Separate inspections of all passenger facilities such as bus stops and shelters are conducted by the Stops and Zones personnel in accordance with **SOP #Safety 0022 – Bus Stop Safety Evaluation**. Any unsafe conditions are reported to their supervisors upon discovery.

Safety inspections documents are maintained, filed and tracked in the Safety Department. Safety inspection reports are available to the Accountable Executive and Department Heads.

Maintenance

Maintenance operating polices, plans, and procedures are routinely monitored by supervisors to assure employees are performing their maintenance functions in a safe manner. **SOP #Safety 0029 – Daily Safety Walkthrough** is a key tool used for this monitoring. Violations of practices and conditions which may cause harm to employees, property, or equipment is corrected and reported to the Safety Department.

Additionally, specific actions are taken to ensure implementation of all safety policies including, but not limited to:

The Deputy Chief Maintenance Officer – Maintenance or designee checks tool calibrations on an annual basis and repairs or replaces the tool as appropriate and maintains documentation to support such checks. The Chief Safety Officer is notified of the results of such checks.

All safety related records of the Maintenance Department are maintained with copies provided to the Chief Safety Officer.

The Chief Safety Officer maintains the database of facility safety issues and evaluates that list on an annual basis to determine safety trends. Such evaluation is reported to the Superintendent of Facility Maintenance and the Chief Operations Officer – Maintenance for further action as necessary.

The Deputy Chief Maintenance Officer – Maintenance maintains all safety-related records of the Maintenance Department and will provide copies of those reports to the Chief Safety Officer.

The Maintenance Department has developed a preventative maintenance schedule for vehicles, which is designed to maintain overall system safety at a maximum interval of 6,000 miles between preventive maintenance evaluations. Reported deficiencies and defects in equipment or facilities are corrected and monitored to assure satisfactory resolution. Only equipment known to be free of defects is placed into service.

Describe activities to conduct investigations of safety events, including the identification of causal factors.

The activities described in the previous section of this plan include investigations and identifying the causal factors of safety events.

Describe activities to monitor information reported through internal safety reporting programs.

SOP #Safety 0000 – Rules/Procedures Review is a methodology conducted by the Deputy Chief Safety Officer and Deputy Chiefs of the operating divisions and is used to ensure uniform, coordinated development and implementation of operating, maintenance and facility procedures.

Several of the tools described earlier in this plan are incorporated into to this process to ensure that data collected throughout SunLine is considered during this review process. Those tools include but are not limited to:

- Weekly Chiefs Meetings

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- Internal Assessment
- Daily Safety Walkthrough
- Drivers Report
- Safety Committee Reports
- Employee Safety Suggestion Program

This data is analyzed then compared to current practices and procedures to ensure that safety concerns have been addressed and procedures are being followed. Where discrepancies are identified, the Deputy Chief of the operating division in question works with supervision and employees to correct the situation.

Should changes to the current practices be required as a result of this review the following steps are taken:

- The concerns and supporting data are brought to the Chief Safety Officer for review.
- The Chief Safety Officer works with the review team to develop a solution.
- The proposed solution is then presented to the affected Department Head for review and approval.
- After Department Head approval the Chief Safety Officer presents the solution to the Accountable Executive for review and approval.
- After Accountable Executive approval the Chief Safety Officer ensures that the solution is returned to the Department Head for implementation.

This review is scheduled to be conducted annually. Throughout the year, the practices are routinely monitored. Should additional discrepancies be found between the SOP and actual practices, the Rules/Procedures is repeated when needed to correct the situation.

When necessary, SunLine hires consultants with specific areas of expertise in safety, hazardous materials handling and hazardous conditions mitigation to assist.

SunLine also stays abreast of industry safety issues and mitigations through membership in several organizations including:

- The American Public Transportation Association (APTA)
- Cal ACT
- California Transit Association
- National Safety Council
- CAL/OSHA Compliance Advisor
- Safety Compliance Alerts
- Injury Prevention Alerts
- Facility Manager Alerts
- Other specific trade organizations

In addition to their responsibilities described throughout this safety plan, SunLine's management team monitors data for trends and shares their findings throughout the organization.

Accountable Executive

- Provides oversight of all SSPP policies, recommendations, actions, and modifications.
- Delegations of responsibilities as appropriate to Department Heads and follow-up on all issues and discussions.
- Allocations/approval of funds to minimize and reduce hazards to implement valid suggestions from the Safety Committee.
- Provision of leadership and direction in the administration of safety activities by showing support for safety rules and objectives.

Chief Safety Officer

- Prioritization of the safety hazards and communication to management.
- Coordinate with the Superintendent of Facility Maintenance in Hazard Identification and Resolution.

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- Manage the Hazardous Materials Business Plan with the Superintendent of Facility Maintenance.
- Track, monitor and manage the modified duty program for employees returning to work with restrictions.
- Maintain all SunLine collision/injury files to identify and establish collision/injury trends and possible corrective actions.
- Track and maintain collision and injury log for trend analysis reports and Key Performance Indicators (KPI's).
- Track safety KPI's for all agency employees and departments.
- Reports directly to the Accountable Executive any and all issues concerning safety and security of the agency, employees, passengers, visitors, contractors and equipment.
- Investigate all SunLine Transit Agency collision and injuries for preventability.
- Submit monthly safety and security data to the National Transit Database.

Chief of Human Relations

- Maintain the CAL-OSHA Log 300
- Post the CAL-OSHA Log 300 (the previous years recorded safety events) in the month of February.
- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Ensure all Human Resources Department employees attend designated mandatory safety meetings.
- Attend safety meetings and support the safety message being presented by the Safety Department.
- Present Human Resources specific information as needed to reinforce the goals of SunLine safety culture.
- Track safety KPI's for the Human Resources Department staff and personnel to reduce or eliminate collision/injury trends.

Chief Transportation Officer

The Operations Department is assigned the responsibility for the safe operation of paratransit and fixed route buses throughout the SunLine Service Area.

These responsibilities include:

- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Monitor adherence to safety-related operating policies, plans, rules and procedures.
 - Personnel whose safety record requires follow-up, additional training, or discipline, including discharge, are identified through the maintenance of records which indicate safety violations of rules and procedures.
 - Safety violations are reported to the Chief Safety Officer.
- Ensure all Dispatchers, Supervisors, and any other safety sensitive personnel attend safety meetings as prescribed.
- Track safety KPI's for Operations Department staff and personnel to reduce or eliminate collision/injury trends.
- Review reported safety concerns from employees/passengers on bus routes/stop in conjunction with the Director of Planning.

Chief Maintenance Officer

The Maintenance Department has developed a preventive maintenance schedule for each system hardware element, which is designed to maintain system safety. Reported deficiencies and defects in equipment and facilities are corrected and monitored to ensure safe operations. Only equipment known to be free of safety defects is placed into service. The Maintenance Department is assigned the responsibility for the maintaining all vehicles in a safe condition.

These responsibilities include:

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- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Monitor adherence to safety-related operating and maintenance policies, plans, rules and procedures.
 - Personnel whose safety record requires follow-up, additional training, or discipline, including discharge, are identified through the maintenance of records which indicate safety violations of rules and procedures.
- Ensure all Maintenance Department employees attend designated mandatory safety meetings.
- Ensure all Maintenance Department Employees attend weekly tailgate safety meetings.
- Analyze and review safety KPI's for Maintenance Department staff and personnel to reduce or eliminate collision/injury trends.

Chief Financial Officer

- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Ensure all specifications for purchases are closely reviewed to ensure purchase of safe materials and equipment.
- Work closely with the Superintendent of Facility Maintenance to ensure all purchases are closely inspected to ensure acceptance and safe materials and equipment.
- Analyze and review safety KPI's for Finance Department staff and personnel to reduce or eliminate collision/injury trends.

Planning Manager

- Review SunLine's safety event record quarterly and provide input to appropriate corrective actions/training when safety event trends are unfavorable.
- Work closely with the Safety and Operations Departments on review of route and bus stops and shelter establishment and ongoing operations.
- Analyze and review safety KPI's for Planning staff and personnel to reduce or eliminate collision/injury trends.

7. Safety Promotion

Competencies and Training

Describe the safety training program for all agency employees and contractors directly responsible for safety.

Safety Training

All training in the Training Department is performed by Transportation Safety Institute (TSI) certified instructors.

All new operators training consists of no less than forty (40) hours of classroom. Classroom consists of TSI courses:

- Bus Maneuvering and Defensive Driving
- Emergency and Safety event Handling Procedures
- Passenger Relations

These are supplemented with other courses that have been incorporated into the training as contained in the Instructors Manual.

Completion of a written examination for all course subjects is required of each student.

New operator training also consists of no less than forty (40) hours of Behind-the-Wheel training before being tested.

- All new operators are trained on all SunLine vehicles which they will be expected to operate

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- An authorized examiner of SunLine administers the road test, following Department of Motor Vehicle guidelines and is recorded on the Certificate of Driving Skill (DL170).
- All training records are kept on file in the Superintendent of Safety and Training files.

After successful completion of the classroom and Behind-the-Wheel segments of the training program, the operators begin cross training, on route, with line operators, who grade their performance on the **Training Progress Report**, which are reviewed by the Training Department.

The total time from classroom to line operator is approximately 6-8 weeks. All hours are documented on **Verification of Transit Training Form** (DL260).

The Safety Department coordinates with training and maintenance training instructors in formulating and refining training programs. Training curriculums are reevaluated for improvements after each training class has been completed. New hire operators are provided course critique sheets to evaluate the driver training course.

Continues safety training to instruct employees on methods to prevent traffic, passengers, and employee safety events is accomplished with:

- Safety meetings
- Tailgate meetings
- Special presentations or classes
- Publications
- Newsletters
- Coaching at work locations

All training on new Agency vehicles is documented and retained by the Training Department.

Dispatch received a list of those operators qualified to operate new equipment.

Initial Training and Re-training is provided as described in the following chart.

Type of Training	Frequency	Comments
Safety Training	Upon Hire	Re-training Monthly
OSHA Training	Quarterly	
Bloodborne Pathogens	Upon Hire	Re-training Annually
Right-to-Know	Upon Hire	Re-training Annually
Equipment Training	Receipt of new equipment	
Emergency Drills	Quarterly	
Fatigue Awareness	Upon Hire	
Alternative Fuel	Upon Hire	As appropriate
General/Specific Safety	Monthly (Main./Ops.)	As appropriate
Hazardous Materials	Upon Hire	As appropriate
CNG Fueling	Upon Hire	As appropriate
Disaster Preparedness	Upon Hire	
Forklift	Upon Hire	Re-training Annually

In relation to the training in the table above, safety training for all operations transit workers and transit workers directly responsible for safety, including maintenance transit workers, includes:

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- **De-escalation**
- **Safety concern identification and reporting**
- **Refresher training (as needed)**

Safety Communication

Describe processes and activities to communicate safety and safety performance information throughout the organization.

Communication Tools

SunLine uses various tools to communicate safety activities, concerns, and notices to employees. SunLine will communicate the results of cooperation with frontline transit worker representatives or the Safety Committee activities throughout SunLine's organization.

The communication tools that SunLine may use include, but are not limited to:

- Employee Safety Meetings
 - Attended by employees from Operations, Maintenance, Human Resource, Planning and Administrative Staff
- Tailgate meetings
- Newsletters
- Publications
- Posting of Safety Committee minutes throughout the organization
- Use of color codes, posters, labels or signs to warn employees of potential hazards

Safety Incentive Awards

Safety awards are used to encourage individual participation in the SSPP.

Presently the Safety Department administers Safe Driving Awards, which recognizes individual yearly miles driven safety event free by transit operators.

Our other safety incentive program is our Quarterly Safety Incentive Program that recognizes the safety achievement of employees with a prize.

Definitions of Special Terms Used in the ASP

SunLine Transit Agency incorporates all of FTA's definitions that are in 49 CFR § 673.5 of the Public Transportation Agency Safety Plan regulation.

Term	Definition
Accountable Executive	A single, identifiable person who has ultimate responsibility for carrying out the Public Transportation Agency Safety Plan of a transit agency; responsibility for carrying out the transit agency's Transit Asset Management Plan; and control or direction over the human and capital resources needed to develop and maintain both the transit agency's Public Transportation Agency Safety Plan, in accordance with 49 U.S.C. 5329(d), and the transit agency's Transit Asset Management Plan, in accordance with 49 U.S.C. 5326.
Assault on a transit worker	A circumstance in which an individual knowingly, without lawful authority or permission, and with intent to endanger the safety of any individual, or with a reckless disregard for the safety of human life, interferes with, disables, or incapacitates a transit worker while the transit worker is performing the duties of the transit worker, as defined in 49 U.S.C. 5302.

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Competent Person	Someone who is capable of identifying existing and predictable hazards in the surroundings or working conditions that are unsanitary, hazardous or dangerous to employees, and who has the authorization to take prompt corrective measures to eliminate them.
Emergency	A natural disaster affecting a wide area (such as a flood, hurricane, tidal wave, earthquake, severe storm, or landslide) or a catastrophic failure from any external cause, as a result of which the Governor of a State has declared an emergency and the Secretary has concurred; or the President has declared a major disaster under section 401 of the Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 U.S.C. 5170), as defined under 49 U.S.C. 5324.
Equivalent entity	An entity that carries out duties similar to that of a Board of Directors for a recipient or subrecipient of FTA funds under 49 U.S.C. Chapter 53, including sufficient authority to review and approve a recipient or subrecipient's Public Transportation Agency Safety Plan.
Hazard	Any real or potential condition that can cause injury, illness, or death; damage to or loss of the facilities, equipment, rolling stock, or infrastructure of a public transportation system; or damage to the environment.
Injury	Any harm to persons as a result of an event that requires immediate medical attention away from the scene.
Investigation	Means the process of determining the causal and contributing factors of a safety event or hazard, for the purpose of preventing recurrence and mitigating safety risk.
Joint labor-management process	A formal approach to discuss topics affecting transit workers and the public transportation system.
National Public Transportation Safety Plan	The plan to improve the safety of all public transportation systems that receive Federal financial assistance under 49 U.S.C. Chapter 53.
Near-miss	A narrowly avoided safety event.
Operator	A provider of public transportation.
Performance Measure	An expression based on a quantifiable indicator of performance or condition that is used to establish targets and to assess progress toward meeting the established targets.
Potential Consequence	The effect of a hazard.
Agency Safety Plan	The documented comprehensive Agency Safety Plan for a transit agency that is required by 49 U.S.C. 5329 and Part 673.
Safety Assurance	Processes within a transit agency's Safety Management System that function to ensure the implementation and effectiveness of safety risk mitigation, and to ensure that the transit agency meets or exceeds its safety objectives through the collection, analysis, and assessment of information.
Safety Committee	The formal joint labor-management committee on issues related to safety that is required by 49 U.S.C. 5329 and 49 C.F.R. part 673.
Safety event	An unexpected outcome resulting in injury or death; damage to or loss of the facilities, equipment, rolling stock, or infrastructure of a public transportation system; or damage to the environment.
Safety Management Policy	A transit agency's documented commitment to safety, which defines the transit agency's safety objectives and the accountabilities and responsibilities for the management of safety.
Safety Management System	The formal, organization-wide approach to managing safety risk and assuring the effectiveness of a transit agency's safety risk mitigation. SMS includes systematic procedures, practices, and policies for managing hazards and safety risks.

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Safety Performance Target	A quantifiable level of performance or condition, expressed as a value for the measure, related to safety management activities, to be achieved within a specified time period.
Safety Promotion	A combination of training and communication of safety information to support SMS as applied to the transit agency's public transportation system.
Safety risk	The composite of predicted severity and likelihood of a potential consequence of a hazard.
Safety Risk Assessment	The formal activity whereby a transit agency determines Safety Risk Management priorities by establishing the significance or value of its safety risk.
Safety Risk Management	A process within a transit agency's Agency Safety Plan for identifying hazards and analyzing, assessing, and mitigating the safety risk of their potential consequences.
Safety risk mitigation	A method or methods to eliminate or reduce the severity and/or likelihood of a potential consequence of a hazard.
Safety set-aside	the allocation of not less than 0.75 percent of assistance received by a large urbanized area provider under 49 U.S.C. 5307 to safety-related projects eligible under 49 U.S.C. 5307.
Serious Injury	Any injury in which: (1) any injury which: (1) Requires hospitalization for more than 48 hours, commencing within 7 days from the date when the injury was received; (2) Results in a fracture of any bone (except simple fractures of fingers, toes, or noses); (3) Causes severe hemorrhages, nerve, muscle, or tendon damage; (4) Involves any internal organ; or (5) Involves second- or third-degree burns, or any burns affecting more than 5 percent of the body surface.
Transit Agency	An operator of a public transportation system that is a recipient or subrecipient of Federal financial assistance under 49 U.S.C. 5307 or a rail transit agency.
Transit Asset Management Plan	The strategic and systematic practice of procuring, operating, inspecting, maintaining, rehabilitating, and replacing transit capital assets to manage their performance, risks, and costs over their life cycles, for the purpose of providing safe, cost- effective, and reliable public transportation, as required by 49 U.S.C. 5326 and 49 CFR Part 625.
Transit worker	Any employee, contractor, or volunteer working on behalf of the transit agency.

List of Acronyms Used in the ASP

Acronym	Word or Phrase
ADA	American's with Disabilities Act of 1990
ASP	Agency Safety Plan (also referred to as a PTASP in Part 673)
CDC	Centers for Disease Control and Prevention of the United States Department of Health and Human Services
CFR	Code of Federal Regulations
ESRP	Employee Safety Reporting Program
FTA	Federal Transit Administration
MPO	Metropolitan Planning Organization
NTD	National Transit Database
Part 673	49 CFR Part 673 (Public Transportation Agency Safety Plan)
SC	Safety Committee
SMS	Safety Management System
U.S.C.	United States Code

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VRM	Vehicle Revenue Miles
FGA	Federal Government Agencies

SunLine Services Group

DATE: December 4, 2024 **ACTION**

TO: Taxi Committee
Board of Directors

FROM: Jill Plaza, Taxi/Contracted Transportation Services Administrator

RE: Second Reading and Adoption of SunLine Services Group (SSG)
Ordinance No. 2024-02, Taxicab Service Ordinance

Recommendation

Recommend that the Board of Directors waive the second reading and adopt SSG Ordinance No. 2024-02 to supersede SSG Ordinance No. 2024-01.

Background

The California insurance industry has undergone significant changes in recent years which has impacted the Coachella Valley taxicab businesses ability to obtain insurance that meets SSG's current "admitted" in California requirement. Historically, it was common practice for public agencies to require insurance carriers to be "admitted" in California since there were a significant number of taxicab insurers that were "admitted" in California. However, staff has been informed that there are now only two (2) taxicab insurers that are "admitted" in California and a considerable amount of insurance is now being written by surplus lines insurers which typically are not "admitted" in California. Keeping SSG's current "admitted" insurance company requirement will hinder taxicab businesses, since it may be cost prohibitive to obtain an insurance policy from one of the two California "admitted" insurers.

Due to these changes in the California insurance industry and after a thoughtful analysis of the benefits and risks with "admitted" insurance carriers, staff recommends that SSG's taxicab ordinance be amended to remove the requirement that insurance coverage be from only "admitted" insurance providers.

Accordingly, staff recommends that the Board adopt SSG Ordinance No. 2024-02, and require that insurers be "authorized" to write business in California, rather than requiring insurers to be "admitted" in California. This will allow taxicab companies to seek insurance coverage from a broader pool of insurance providers. Insurers will still be required to be rated with at least an A insurance rating by AM Best. Staff believes this change will appropriately protect SSG and taxicab riders while ensuring taxicab companies and will remain competitive in the Coachella Valley.

If approved and adopted by the Board of Directors, Ordinance No. 2024-02 would supersede and replace Ordinance No. 2024-01, and revise Section 1.040.A.3 to read as follows:

“Insurance required by this Section shall be satisfactory only if issued by companies having at least an A insurance rating on AM Best, or equivalent, and are authorized to write business in California. All applicants are required to comply with this Section prior to the issuance of any Business Permit.”

A redlined copy of the Ordinance showing the aforementioned changes is included for the Board's review. The Ordinance was brought forward for first reading and discussion at the October 23, 2024 Board meeting.

Financial Impact

There is no financial impact to the SSG FY2025 budget associated with this agenda item.

Performance Goal

Goal 2A: To strive to deliver highly accessible, convenient and trusted mobility solutions that efficiently meet the diverse needs of the Coachella Valley citizens and improve their connectivity to daily life needs.

Attachments:

- [Item 14a](#) – Redlined Copy of Ordinance No. 2024-02
- [Item 14b](#) – Ordinance No. 2024-02 (Redlined Changes Accepted)

ORDINANCE NO. 2024-0~~2~~4
AN ORDINANCE OF SUNLINE SERVICES GROUP
SUPERSEDING ORDINANCE NO. 202~~4~~1-01

WHEREAS, Government Code Section 53075.5 requires every city and county to protect the public health, safety and welfare by adopting an ordinance concerning the provision of taxicab services, to provide a policy for entry into the business of providing taxicab services, to establish maximum rates for the provision of such services, and for such other matters as determined by the legislative body; and,

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

WHEREAS, members of STA have delegated the authority to regulate the safe operation of taxicab services to SunLine Services Group (SSG); and

WHEREAS, to modernize the regulation of taxicab transportation services and in order for taxicabs to better compete with all for hire modes of transportation the State amended Government Code Section 53075.5 through Assembly Bill 1069 and Assembly Bill 939; and,

WHEREAS, SSG intends to adopt procedures compliant with Assembly Bill 1069 and Assembly Bill 939 for the regulation of taxicab transportation services in the Coachella Valley.

NOW, THEREFORE, the Board of Directors of SSG does ordain as follows:

SECTION 1: ADOPTION OF TAXICAB SERVICE ORDINANCE.

SSG hereby adopts this ordinance regulating taxicabs within the jurisdictional boundaries of SSG, superseding and replacing Ordinance 202~~4~~1-01, as attached hereto as Exhibit A.

SECTION 2: SEVERABILITY.

If any section, subsection, sentence, clause or phrase of this ordinance is for any reason held to be invalid or unconstitutional by the decision of a court of competent jurisdiction, such decision shall not affect the validity of the remaining portions of the ordinance of SSG. The Board of Directors of SSG hereby declares that it would have passed this ordinance, and each section, subsection, clause, sentence or phrase thereof, irrespective of the fact that any one or more other sections, subsections, clauses, sentences, or phrases may be declared invalid or unconstitutional.

SECTION 3: EFFECTIVE DATE.

This ordinance shall take effect ~~July 1, 2024, twenty (20) days from upon~~ its passage by the Board of Directors of SSG.

SECTION 4: PUBLICATION.

The Clerk of the Board is authorized and directed to cause this ordinance to be published within fifteen (15) days after its passage in a newspaper of general circulation and circulated within the jurisdictional boundaries of SSG in accordance with Government Code Section 36933(a) or, to cause this ordinance to be published in the manner required by law using the alternative summary and posting procedure authorized under Government Code Section 36933(c).

INTRODUCED at the regular meeting of the Board of Directors of SunLine Services Group on the ~~23rd~~ ~~4th~~ day of ~~October~~~~April~~, 2024.

APPROVED AND ADOPTED by the Board of Directors of SunLine Services Group at a regular meeting held on ~~4th~~ ~~22nd~~ day of ~~December~~, ~~May~~, 2024.

~~Nancy Ross Lisa Middleton~~
Chairperson of the Board

ATTEST:

Edith Hernandez
Clerk of the Board

APPROVED AS TO FORM:

Catherine Groves
General Counsel

EXHIBIT A: TAXICAB SERVICE ORDINANCE

CHAPTER ONE

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CHAPTER ONE

ARTICLE I

PERMITTING OF TAXICAB BUSINESSES AND DRIVERS

Section 1.010 Purpose

State law requires every city or county to adopt an ordinance or resolution in regards to taxicab transportation services, which include, among others, a policy for entry into the business, establishment of registration rates, and mandatory controlled substance and alcohol testing programs. In October 2017, Assembly Bill 1069 was enacted to modernize the regulation of taxicab transportation services in order for taxicabs to better compete with all for hire modes of transportation. In September, 2018, Assembly Bill 939 was subsequently enacted imposing additional duties on local governments related to taxicab transportation services. This ordinance establishes a permitting process and regulatory structure consistent with the requirements of state law.

Section 1.015 Definitions and Statutory References

As used in this Chapter:

- A. "AB 1069" means Assembly Bill 1069 *Local government: taxicab transportation services* as codified in Government Code Sections 53075.5, 53075.51, 53075.52 and 53075.53.
- B. "AB 939" means Assembly Bill 939 *Local government: taxicab transportation services* amending Government Code Sections 53075.5, 53075.51, and 53075.52.
- C. "Advertisement" means the dissemination in any newspaper, circular, form letter, brochure, business card, telephone directory (including the yellow and/or white pages) or similar publication, display, sign, internet, phone and/or tablet "app", radio broadcast, telecast of by other electronic means, information designed to promote the use of a Taxicab Business' services.
- D. "Alternative Fuel Vehicle" means vehicles and engines that are designed for alternative fuels including but not limited to hydrogen, natural gas, propane; alcohols such as ethanol, methanol, and butanol; vegetable and waste-derived oils; and electricity.
- E. "Board" or "Board of Directors" means the Board of Directors of SunLine Services Group.
- F. "Business" means any person, firm, association, corporation, partnership or other entity that is established to operate or lease one or more taxicabs within the jurisdictional boundaries of SSG that is issued a permit by the Taxi Administrator pursuant to this ordinance.

- G. "Business Permit" means the permit issued by SSG to a business authorizing the business to operate taxicab services in the jurisdictional boundaries of SSG.
- H. "Business Permit Fee" means the fees charged for issuance of the business permit.
- I. "Business Permit Application Fee" means the fees charged for the review of an application for a Business Permit prior to issuance.
- J. "Control Person" means any person, firm, association, corporation, partnership, owner, investor, shareholder, officer and director that has or have a majority interest in the Taxicab Business.
- K. "Driver" means an individual natural person who drives or is allowed to drive a taxicab under the name of a business. This includes, but is not limited to: full time, regularly employed drivers; casual intermittent or occasional drivers; leased drivers and independent, owner-operator contractors who are either directly employed by or under lease to a business or who drive or operate a taxicab at the direction of or with the consent of a business.
- L. "Engaged with a Passenger" means ongoing interactions between the Driver and passenger during the course and scope of providing taxicab service to the passenger.
- M. "Jurisdictional Boundaries of SSG" means the territory within the jurisdictional boundaries of the cities of Desert Hot Springs, Palm Springs, Cathedral City, Rancho Mirage, Palm Desert, Indian Wells, La Quinta, Indio, Coachella, and the unincorporated area of Riverside County that is within the territorial boundaries of the Palm Springs and Desert Sands Unified School District, and that portion of the Coachella Valley Unified School District located within Riverside County, as such boundaries may be adjusted from time to time as allowed for under the law.
- N. "Permittee" means any business including any owners, investors, shareholders, partners, officers, directors and representatives acting on its behalf or driver that has been issued a permit pursuant to the Article I.
- O. "Prorated" means a pro rata distribution based on the date of business, driver or vehicle permit issuance.
- P. "Pull Notice Program" as referred to in Vehicle Code Section 1808.1 shall mean a process for the purpose of providing the employer with a report showing the Driver's current public record by the Department of Motor Vehicles and any subsequent convictions, failures to appear, accidents, driver's license suspensions, driver's license revocations, or any other actions taken against the driving privilege or certificate, added to the driver's

record while the employer's notification request remains valid and uncanceled.

- Q. "Per Mile" means the charge to a taxicab passenger calculated and based on distance traveled by the taxicab vehicle.
- R. "SSG" means the joint powers authority established by Riverside County and Coachella Valley cities charged with the duties, obligations and responsibilities to implement and enforce this ordinance and any related ordinance and any regulations promulgated pursuant thereto as directed by the SSG Board.
- S. "Substantially Located" shall have the same meaning as defined within Government Code Section 53075.5.
- T. "Taxicab" means every automobile or motor propelled vehicle, designed for carrying not more than eight persons, excluding the driver, where the driver's seat may be separated from the passenger's compartment by a glass or other partition used for the transportation of passengers for hire over the public streets in the jurisdictional boundaries of SSG, and not over a defined route, irrespective of whether the operations extend beyond the jurisdictional boundaries, in circumstances where the vehicle is routed under the direction of the passenger of the person hiring the same.
- U. "Taxi Administrator" means the General Manager of SSG or his/her designee.
- V. "Vehicle Permit" means a valid permit issued by SSG, authorizing a particular vehicle to be operated as a Taxicab.
- W. "Vehicle Permit Fee" means a non-transferable authorization to drive or operate a vehicle as an authorized Taxicab transportation service within the jurisdictional boundaries of SSG, whether as owner, lesser, lessee, or otherwise.

As used in this Chapter, any citation or reference to a California code or statute is intended to include any subsequent amendments enacted by the state thereto.

Section 1.020 Taxi Administrator

- A. The Taxi Administrator shall be authorized to carry out the permitting and regulation of Businesses and Drivers under this Chapter, and to enforce the provisions of this Chapter in compliance with California Government Code sections 53075.5 and 53075.51. The Taxi Administrator is authorized to promulgate and adopt regulations and procedures necessary to implement all provisions of this Chapter.

- B. The Taxi Administrator shall be authorized to conduct investigations, audits or field inspections in order to enforce the provisions of this Chapter and regulations.

Section 1.025 Delivery of Notices or Requests

- A. All notices or requests referred to in this ordinance shall be delivered to the Administrative Office of SSG. All notices or requests referred to in the ordinance of SSG to any business or individual shall be delivered to the address of record for the business or individual.
- B. Notices or requests referred to in this ordinance may be delivered through electronic mail to the address provided in the application for a Business, Driver or Vehicle Permit.
- C. Delivery of any notice or request shall be effective as follows:
 - 1. Immediately if given by personal delivery or electronic mail;
 - 2. One (1) day after delivery if delivered by an overnight delivery service; and
 - 3. Three (3) days after delivery if delivered by U.S. Mail.

Section 1.030 Business Permit Required

- A. It is unlawful for any business to operate a Taxicab or Taxicabs without first having been issued a Business Permit from SSG if the Business is substantially located within the Jurisdictional Boundaries of SSG.
- B. A Business Permit may be obtained from SSG as provided below. The Permit shall state the name of the Taxicab Business, location of principal operation, and the date of issuance. If the Taxicab Business and the Driver are the same person, he or she shall apply for and obtain from SSG both a Business Permit and a Driver permit.
- C. An applicant for a Business Permit shall complete an application form which shall contain the following information:
 - 1. Name of Business as recorded in formation documents filed with the California Secretary of State or fictitious business name as registered with Riverside County;
 - 2. Name, job title, and function of all owners, investors, shareholders, partners, officers, directors and representatives acting on the Business' behalf and provide such information as is required to evaluate the legitimacy of the company's business structure, qualifications, corporate stability, financial stability and capability;

3. Fingerprint based criminal history check of all owners, investors, shareholders or partners that hold an interest in the Taxicab Business;
4. Address of principal place of business from which the Business conducts its activities;
5. Address of all locations from which the Business conducts its activities;
6. Electronic mail address for the purpose of providing notice or requests.
7. Before any Business Permit is issued, the applicant shall procure and maintain, at its cost, comprehensive general liability and property damage insurance, against all claims for injuries against persons or damages to property which may arise from or in connection with the operation of Taxicabs by the applicant, its agents, representatives, employees, or subcontractors and the owner of the vehicle;
8. A list of the Vehicle Identification Numbers (“VIN”) of the Taxicabs (“vehicle identification list”) which have annually passed a vehicle safety inspection at a facility certified by the National Institute for Automotive Service Excellence or a facility registered with the Bureau of Automotive Repair. The list shall include vehicle number, license plate number, and SSG permit number;
9. A current list of all Drivers authorized to operate any vehicle on the required vehicle identification list;
10. Evidence of valid and current California Department of Motor Vehicle Registration for each Taxicab listed in the vehicle identification list;
11. Verification of safety and education program as required by Government Code Section 53075.5;
12. Verification of disabled access education program as required by Government Code Section 53075.5;
13. Verification of participation in the Pull-Notice Program pursuant to Section 1808.1 of the California Vehicle Code;
14. Each applicant shall submit information establishing the total number of prearranged and non-prearranged trips that originate within the Jurisdictional Boundaries of SSG accounting for the largest share of the Business' total number of trips over the applicable time period pursuant Government Code Section 53075.5; and,

15. Each applicant shall provide SSG an address of an office or terminal where documents supporting the factual matters specified in Government Code Section 53075.5 may be inspected by SSG upon request.
- D. The Business Permit shall be valid for a period of one (1) year, beginning July 1st of each year and expiring June 30th or until suspended, revoked or surrendered. Requirements to approve and maintain the permit include:
1. Taxicab Businesses shall have a distinctive name and appearance and shall have a standard monogram, insignia, or logo which is permanently affixed to each vehicle and indicates that the vehicle is offered for the use of transportation of passengers of hire. Distinctive name includes consideration of a specific color referenced in the Taxicab Business' name and distinctive appearance may include the original factory paint color;
 2. Maintenance of a year-round computerized dispatch system capable of providing performance reports as required by Government Code Section 53075.5 and the Taxi Administrator;
 3. At least one (1) wheelchair-accessible van that meets federal standards as provided in Title 49, Subtitle A, Part 38 of the Code of Federal Regulations ready and available as may be requested in its fleet;
 4. Proof of insurance per section 1.040;
 5. Compliance with the maximum rates established per section 1.070;
 6. Implementation of mandatory controlled substance and alcohol testing program per section 1.075;
 7. Maintenance of safety education and training program;
 8. Maintenance of disabled access education and training program;
 9. Maintenance of current and valid California Department of Motor Vehicles Registration for each Taxicab listed in the vehicle identification list;
 10. Continuous participation in the Pull Notice Program per Vehicle Code Section 1808.1; and,
 11. Compliance with all operational requirements in Article II of this Chapter.

- E. Each Taxicab Business shall at all times maintain accurate and complete accounts of all revenues and income arising out of its Taxicab operations, a list of vehicles in use, a list of all Drivers of the company, any complaints by patrons and any other information SSG may require to verify compliance with the ordinance of SSG. The Taxicab Business' books, accounts and records pertaining to compliance with the ordinance of SSG shall at all reasonable times be open to inspection, examination and audit by the authorized officers, employees and agents of SSG. The refusal of a Taxicab Business to provide the required records for inspection shall be deemed a violation of the ordinance of SSG and cause for termination of the Taxicab Business permit. Any proprietary data provided to SSG shall be maintained confidential to the extent permitted by law.
- F. At the time the application for a Business Permit is received, the applicant shall pay a Business Permit Application Fee as established and amended from time to time by resolution of the Board. Fees shall be due and payable before a Business Permit application is processed. Prorated fees will be based on the date of Business Permit approval.
- G. At the time the application for a Business Permit is received, it will be reviewed for accuracy and compliance within ten (10) days. The applicant will receive a deficiency notice should the application and documents be lacking and/or incomplete. The applicant shall have thirty (30) days from the date of deficiency notice to remedy and re-submit application deficiencies. Applications that have not met the minimum requirements for a Business Permit within sixty (60) days will be denied. A new Business Permit application must be submitted for consideration, thereafter.
- H. At the time a Business Permit Application is approved, the applicant shall pay the Annual Taxicab Business Permit Fee. The Annual Taxicab Business Permit Fee shall be due and payable before issuance of a Business Permit. The Annual Taxicab Business Permit Fee may be adjusted by resolution of the Board.
- I. The Board may establish a procedure for a payment of the Business Permit Fee in installments.
- J. The rights of appeal provided for by Section 1.085 are available to a Business in the event that his or her Business Permit is denied based on the provisions of this Chapter.
- K. In the event a Taxicab Business or any Control Person transfers 50% or more of its interest in the Business therein, the Taxicab Business' Permit cannot be sold or transferred in part or in whole, by assignment, trust, mortgage, lease, sublease, pledge or other hypothecation without prior written consent of the Board.

Section 1.035 Business Permit Renewal

- A. Sixty (60) days prior to the expiration of a Business Permit the Business may apply to SSG for a renewal thereof for an additional year. A Business shall be entitled to a one (1) year renewal of the Business Permit provided that:
 - 1. The Business submits a Business Permit renewal application;
 - 2. The Business pays the annual renewal application fee;
 - 3. The Business pays the Business Permit Fee;
 - 4. The Business pays the applicable Taxicab Vehicle Permit Fee;
 - 5. The Business shows that it continues to be substantially located within the Jurisdictional Boundaries of SSG as defined in Government Code Section 53075.5;
 - 6. The Business continues to comply with all provisions of Section 1.030.

- B. The rights of appeal provided for by Section 1.085 are available to a Business in the event that renewal of his or her Business Permit is denied based on the provisions of this Chapter.

Section 1.040 Insurance Required

- A. The insurance policies required under this Chapter shall consist of and contain or be endorsed to contain the following provisions:
 - 1. General Liability and Automotive Liability Coverage:
 - a. SSG, its member entities, their officers, officials, employees, and volunteers are to be covered as additional insureds for liability related to:
 - i. Activities performed by or on behalf of the Business;
 - ii. Premises owned, occupied, or used by the Business; and,
 - iii. Automobiles owned or leased by the Business.
 - b. The Permittee shall also carry Workers' Compensation Insurance in accordance with State of California Workers' Compensation laws.

- c. The coverage shall contain no special limitations on the scope of protection afforded to SSG, its member entities, their officers, officials, employees, agents, representatives, or volunteers.
- d. The business' insurance shall be the primary insurance of SSG, its member entities, their officers, officials, employees, agents, representatives and volunteers. Any insurance or self-insurance maintained by SSG, its member entities, their officers, officials, employees, agents, representatives or volunteers shall be in excess of the Permittee's insurance and shall not contribute with it.
- e. Any failure to comply with reporting provisions of the policy shall not affect coverage provided to SSG, its member entities, their officers, officials, employees and agents.
- f. Permittee's insurance shall apply separately to each insured against whom a claim is made or a suit is brought, except with respect to the limits of the insurer's liability.

2. All Coverage:

- a. Each insurance policy required by this Section shall be endorsed to state that coverage shall not be suspended, voided, cancelled by either party, reduced in coverage or in limits except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to SSG.
- b. Permittee shall furnish SSG with a certificate of insurance and any applicable policies and endorsements affecting the coverage required hereunder. The policies and endorsements are to be signed by a person authorized by that insurer to bind coverage on its behalf. At SSG's option, endorsements and any certificates of insurance required by SSG shall be on forms provided or approved by SSG. All endorsements and certificates are to be received and approved by SSG prior to the operation of any Taxicab by the Permittee in the Jurisdictional Boundaries of SSG. SSG reserves the right to require complete certified copies of all insurance policies, including endorsements affecting the coverage required by this ordinance, at any time and shall include, but not limited to, the obligation to indemnify, hold harmless, release and defend SSG.

- c. Business Permittee shall include all individual Drivers employed by Permittee, agents, contractors, other sub-operators as may be permitted by SSG, as insureds under its policies or shall furnish separate certificates and endorsements for each sub-operator. All coverage for such sub-operators shall be subject to all of the requirements stated herein.
 - d. The procuring of such insurance or the delivery or endorsements and certificates evidencing the same shall not be construed as a limitation of the Permittee's obligation to indemnify, hold harmless, release and defend SSG, its member entities, their officers, officials, employees, agents, representatives, and volunteers from and against any and all liability, claims, suits, costs, expenses, fines, judgments, settlements, charges or penalties, including reasonable attorney's fees, regardless of the merit or outcome of the same arising out of, or in any manner connected with, any or all of the operations or services authorized conducted or permitted under this ordinance.
 - e. The amount of insurance required hereunder shall be as follows:
 - i. For injury or death in any one accident or occurrence, three hundred fifty thousand dollars (\$350,000.00);
 - ii. For the injury or destruction of property in any one accident or occurrence, three hundred fifty thousand dollars (\$350,000.00);
 - iii. For combined single limits of liability for primary bodily injury and primary property damage, three hundred fifty thousand dollars (\$350,000.00);
 - iv. For employer's liability, with limits of three hundred fifty thousand dollars (\$350,000.00).
 - f. It shall be the responsibility of all Permittees to provide and maintain insurance coverage in compliance with the provisions of this ordinance to cover each and every driver that operates a vehicle as a Taxicab. The Permittee shall further ensure that appropriate certificates of insurance reflecting the coverage are on file with SSG at all times.
3. Insurance required by this Section shall be satisfactory only if issued by companies having at least an A insurance rating on - AM Best

~~Insurance Rating~~ or equivalent, and are ~~admitted~~ authorized to ~~do~~ write business in California. All applicants are required to comply with this Section prior to the issuance of any Business Permit.

4. Permittees are responsible to ensure compliance with all of the foregoing insurance requirements and regulatory provisions related to such requirements. Responsibility on the part of the Permittee includes ensuring that any vehicle owner whose vehicle is operated under the Business Permittee's name maintains insurance and provides SSG with proof of the same at all times that each vehicle is operated. Failures to comply with the foregoing insurance requirements which affect the Business as a whole shall result in immediate suspension of the permit. Failure to comply with the foregoing insurance requirements three (3) times within a calendar year constitutes grounds for revocation of the permit.
- B. Permittees shall maintain on file with SSG evidence of its insurance coverage meeting all the requirements as indicated in this Section. The Permittee shall provide SSG with verbal notice within 24 hours in the event of any change in insurance coverage and written notification of any insurance change within three (3) calendar days after the change.

Section 1.045 Driver Permit Required

- A. It is unlawful for any person to drive a Taxicab without having first obtained a Driver permit from SSG. A Driver permit may be obtained as provided below.
- B. An applicant for a Driver permit shall complete an application which shall contain the following information:
1. Applicant's full name, residence address and age;
 2. A listing of all equivalent permits which have been issued to the applicant by any governmental agency;
 3. Applicant's height, weight, gender and color of eyes and hair;
 4. The number and expiration date of the applicant's California driver's license;
 5. All moving violations within the last 3 years, including dates of violations and the jurisdiction where each violation occurred;
 6. Authorization for SSG, or its agents or employees to seek information and conduct an investigation into the truth of the statements set forth in the application and the qualifications of the applicant; and

- C. The Taxi Administrator may accept the submission of a permitted Business' Driver application that provides all the information required in subsection B above in lieu of the Driver application provided by SSG.
- D. At the time the applicant submits an application for a Driver permit, the applicant shall do all of the following:
 - 1. Submit to a fingerprint based criminal history check pursuant to Government Code Section 53075.5;
 - 2. Provide SSG with a copy of the results of the drug and alcohol test as conducted by the Business pursuant to Government Code Section 53075.5 and Section 1.075 of this ordinance;
 - 3. Provide proof of insurance as insureds under an employer's policies as required by Section 1.040;
 - 4. Provide proof of completion for taxi business's driver safety education and training program;
 - 5. Provide proof of completion for taxi business's disabled access education and training program;
 - 6. Provide Intent to Hire form indicating the name of the Business with whom the applicant is employed or who has given the applicant an offer of employment within the meaning of Government Code Section 53075.5;
 - 7. Provide SSG with a copy of the Department of Motor Vehicles Pull Notice Program enrollment, as defined in Vehicle Code Section 1808.1; and
 - 8. Payment of Driver permit fee as established and amended from time to time by resolution of the Board. The Driver permit fee shall be due and payable before receipt of the driver permit.
- E. The Driver permit shall state the name of the employer.
- F. In the event of denial, revocation or suspension of a Driver permit, the applicant may within ten (10) days of notification of denial apply to SSG for a hearing on the denial in accordance with the procedures set forth in Section 1.085.
- G. The Driver permit shall be valid for a period of one (1) year or until suspended, revoked or surrendered. Termination of the Driver's California driver's license shall constitute grounds for revocation of the Driver permit authorized hereunder.

- H. Upon termination of employment within the meaning of Government Code Section 53075.5 the permit shall become void. In such case, the Driver shall immediately return the Driver permit to SSG. Upon return of the Driver permit, the Driver may re-apply for a Driver permit, provided that the Driver complies with the requirements for issuance of a Driver permit under this Section.

Section 1.050 Driver Permit Renewal and Transfer

- A. Prior to the expiration of a Driver permit, the Driver may apply to SSG for a renewal thereof for an additional year. A Driver shall be entitled to a one (1) year renewal of the Driver permit provided that:
1. The Driver submits a completed renewal application which shall contain the information stipulated in Section 1.045, subsection B.
 2. The Driver pays a permit renewal fee as established and amended from time to time by resolution of the Board;
 3. The Driver submits to permit-renewal controlled substances and alcohol testing as provided by Government Code Section 53075.5;
 4. The results of controlled substances and alcohol testing indicate that the Driver has not been using a controlled substance as specified in Part 40 (commencing with Section 40.1) of Title 49 of the Code of Federal Regulations;
 5. The results of such testing indicate that the Driver has a breath concentration of less than 0.02 percent on an alcohol screening test; and,
 6. The Driver has not been convicted of any of the crimes, including but not limited to, those crimes enumerated in Section 1.080 during the preceding year.
- B. A Driver may request a transfer of his/her Driver Permit to another Permittee provided the Driver has submitted the following:
1. A Driver permit application signed by an authorized representative of the prospective Permittee;
 2. Intent to Hire Form;
 3. A copy of the results of the drug and alcohol test as conducted by the Business pursuant to Government Code Section 53075.5 and Section 1.075 of this ordinance;

4. Proof of insurance as insured under a Business' policy as required by Section 1.040;
 5. Proof of completion for taxi business's driver safety education and training program;
 6. Proof of completion for taxi business's disabled access education and training program;
 7. A copy of the Department of Motor Vehicles Pull Notice Program enrollment, as defined in Vehicle Code Section 1808.1;
 8. A Driver permit transfer fee; and
 9. SSG Driver permit to be transferred.
- C. Driver shall not operate a Taxicab until the transfer permit is obtained and in possession of the Driver pursuant to this Section.
- D. A transferred Driver permit shall expire on the same date as the original Driver Permit and shall not exceed the Driver's permit period.
- E. If the Driver permit has expired or terminated and is not renewed or transferred within thirty (30) business days of the expiration or termination, the Driver shall be required to re-apply as a new applicant for issuance of a Driver permit and shall pay all fees associated therewith.
- F. The rights of appeal provided for by Section 1.085 are available to a Driver in the event that renewal of his or her Driver permit is denied based on the provisions of this Chapter.

Section 1.055 Vehicle Permit Required

- A. It is unlawful for any Taxicab to operate without first having been issued a Vehicle Permit from SSG, unless otherwise authorized by Government Code section 53075.5. At all times while providing Taxicab service, the Vehicle Permit must be affixed to the lower left rear windshield of the vehicle.
- B. A Vehicle Permit may be issued provided that the vehicle has successfully completed a safety and cosmetic inspection conducted by a facility certified by the National Institute for Automotive Service Excellence or a facility registered with the Bureau of Automotive Repair in accordance with the vehicle safety standards.
- C. The Vehicle Permit shall be valid for a period of one (1) year, beginning July 1st of each year and expiring June 30th or until suspended, revoked or surrendered.

- D. The Vehicle Permit Fee shall be due and payable upon the issuance of a Vehicle Permit. Permittees shall pay the Vehicle Permit Fee for each vehicle that is issued a Vehicle Permit.
- E. 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.
- F. If a Taxicab Business' Business Permit is suspended or terminated pursuant to section 1.080, all corresponding Vehicle Permits shall also be suspended. Owners of all vehicles with a suspended Vehicle Permit shall present vehicles to SSG for out of service Taximeter readings immediately upon suspension or termination of a Taxicab Business or expiration, suspension or termination of the Vehicle Permit sticker. The owner of the vehicle shall have thirty (30) days to register the vehicle with an existing and valid Taxicab Business permit holder. If the owner fails to register the vehicle within such thirty (30) day period, the vehicle shall be presented to SSG for removal of the Vehicle Permit sticker (if such sticker has not already been surrendered) and the balance of the Vehicle Permit Fee owing to SSG for the vehicle shall be immediately due and payable. SSG shall pursue collection of the Vehicle Permit Fee from either the Taxicab Business or the owner of the vehicle and no Vehicle Permit sticker shall be issued to the vehicle regardless of its ownership until the Vehicle Permit Fee owing to SSG shall have been paid.

Section 1.060 Vehicle Permit Renewal

- A. Prior to the expiration of a Vehicle Permit, the Permittee may apply to SSG for a renewal thereof for an additional year. A Vehicle Permit may be entitled to a one (1) year renewal provided that:
 - 1. Payment of the Vehicle Permit Fee as established and amended from time to time by resolution of the Board is received; and
 - 2. All requirements for initial issuance of a Vehicle Permit are maintained as provided in Section 1.055.
- B. The rights of appeal provided for by Section 1.085 are available in the event that renewal of a Vehicle Permit is denied based on the provisions of this Chapter.

Section 1.065 Vehicle Inspections

- A. Prior to obtaining a Taxicab Business Permit, an applicant shall first present each vehicle to be used as a Taxicab to a facility certified by the National Institute for Automotive Service Excellence or a facility registered with the Bureau of Automotive Repair, and SSG, for a vehicle safety and cosmetic

inspection. Any vehicle(s) that a Taxicab Business proposes to add to its fleet shall also be presented to a facility certified by the National Institute for Automotive Service Excellence or a facility registered with the Bureau of Automotive Repair, and SSG, for successful completion of a vehicle safety and cosmetic inspection prior to operation as a Taxicab. The Taxicab Administrator shall maintain a list which reflects the VIN of each vehicle that successfully completes the vehicle safety inspection. A record of the VIN of each vehicle that fails the vehicle safety inspection shall also be maintained by SSG.

- B. In addition to the initial vehicle safety and cosmetic inspection, each vehicle shall be required to pass additional inspections at the following times:
 - 1. Every twelve (12) months from the date the vehicle is first licensed as a Taxicab;
 - 2. After every incident resulting in cosmetic or greater damages; and,
 - 3. At any time upon written request by the Taxi Administrator.
- C. Failure to present a vehicle for inspection under this ordinance within three (3) days of the date upon which a request under Section 1.025 is delivered or within three (3) days after inspection is due shall result in the issuance of a penalty in accordance with Section 1.095. Further failure to present a vehicle for inspection under this ordinance within ten (10) days of the date upon which a written request is delivered or inspection is due shall result in the vehicle being declared presumed unfit to operate as a Taxicab, an administrative citation shall be issued to that effect, and the vehicle shall be read out of service.
- D. It is unlawful to operate a Taxicab vehicle in an unsafe operating condition, including but not limited to a condition that violates the vehicle safety inspection standards of SSG. All Taxicab Businesses are responsible to ensure that their vehicles are maintained in a safe operating condition at all times that they are in service. An incident that results in any cosmetic or greater damage shall be reported to SSG.

Section 1.070 Rates

- A. No Permittee operating in the Jurisdictional Boundaries of SSG may charge a rate in excess of the maximum rate of \$12.00 Per Mile, \$4.00 flag drop/base rate, and \$24.00 per hour for traffic delay or waiting time. Maximum rates may be adjusted by resolution of the Board.
- B. A Permittee may charge a rate that is less than the maximum rate set by SSG. Permittees may set fares or charge a flat rate as made permissible by

Government Code Section 53075.5. No other fees or rates may be charged by a Permittee except as permitted by law.

- C. The Board may from time to time establish maximum flat rates for special events or fixed routes.
- D. A Permittee may use any type of device or technology approved by the Division of Measurement Standards to calculate fares as provided for in Government Code Section 53075.5.
- E. The Permittee shall disclose fares, fees or rates to the customer as provided for in Government Code Section 53075.5.
- F. The Permittee shall notify the passenger of applicable rates prior to the passenger accepting the ride for walk up rides and street hails as provided for in Government Code Section 53075.5.

Section 1.075 Mandatory Controlled Substance and Alcohol Testing Program

- A. Each Permittee shall maintain a mandatory controlled substance and alcohol testing certification program conforming to all requirements as set forth in California Government Code Section 53075.5 and Part 40 (commencing with Section 40.1) of Title 49 of the Code of Federal Regulations.
- B. Each Business shall maintain a written drug and alcohol policy as required by Government Code Section 53075.5 and proof that the Business has implemented a drug and alcohol certification program covering all of its drivers.
- C. No Business shall permit a Driver who refuses to submit to such tests to operate or continue to operate a Taxicab.
- D. In the case of self-employed independent Driver within the meaning of Government Code Section 53075.5, the test results shall be reported directly to SSG. In all other cases, the test results shall be reported to the Business who has employed or made an offer of employment to the Driver within the meaning of Government Code Section 53075.5.
- E. Results of all tests provided for in this Section are confidential and shall not be released to the public without the written consent of the Driver, except as provided by law.

Section 1.080 Denial, Revocation, or Suspension of Permits

- A. In addition to any other reason provided for in this Chapter, a permit may be denied, suspended or revoked when it has been determined that the

Business, including any owners, investors, shareholders, partners, officers, directors, and representatives acting on its behalf:

1. Has not complied with the applicable provisions of Article I; or
2. Has not complied with the applicable provisions of the regulations; or
3. Has failed to cure any item listed in a sixty (60) day warning for failure to comply with any requirements of permit issuance; or
4. Has been issued three (3) sixty (60) day warnings of failure to comply with any requirements of this Chapter within a period of twelve (12) months; or
5. Has knowingly made a false statement of fact in an application for such permit; or
6. Has any outstanding balance owed to SSG; or
7. Has charged rates or fares exceeding the maximum rates other than those permitted by Section 1.070.

B. Business and Driver Criminal Conduct

1. A permit may be denied, suspended or revoked when it has been determined that the Business, including any owners, investors, shareholders, partners, officers, directors, and representatives acting on its behalf or Driver has been convicted of any of the following crimes within the timeframes set forth below, whether committed in the State of California or elsewhere. A conviction within the meaning of this Section means a plea or verdict of guilty or a conviction following a plea of nolo contendere:
 - a. Any conviction regardless of the time elapsed, in any state, of any of the following or their equivalent:
 - i. Any crime (apart from adult same-sex consensual sexual behavior) which requires the applicant to register as a sex offender under California Penal Code §290 shall require denial or revocation; or
 - ii. Any felony involving actual or threatened violence against persons, including, but not limited to, assault, battery, robbery or the use of a firearm or other weapon against a person.
 - b. Any conviction (felony or misdemeanor) within the past seven (7) years of any crime involving theft or dishonesty, including,

but not limited to, burglary, theft, shoplifting or other crime related to fraud or intentional dishonesty; or

- c. Any conviction (felony or misdemeanor) within the past seven (7) years of any crime involving the sale, possession or transportation of narcotics or other controlled substances; or
 - d. Any conviction (misdemeanor or felony) within the past three (3) years of any crime involving pandering or prostitution.
2. In addition to the crimes listed above, no Driver permit shall be granted to an applicant who has been convicted of three (3) or more moving violations within three years previous to submission of the application. Any permit previously granted shall be revoked for any Driver who has been convicted of three (3) or more moving violations within three (3) years.
 3. In addition, if an applicant has been convicted of, or pled nolo contendere at any time within the past seven (7) years, to a violation related to driving under the influence of alcohol or drugs, the applicant shall be disqualified and the application shall be denied. If after issuance of a permit to a Driver, the Driver is convicted of, or pleads nolo contendere to, a violation related to driving under the influence of alcohol or drugs, the Driver's permit shall be revoked.
- C. In addition to the foregoing, a Driver permit may be suspended, revoked or denied in the event that:
1. A driver is involved in an accident due to a medical condition that prevents the Driver from safely operating a vehicle, or;
 2. A medical condition that prevents a Driver from safely operating a vehicle otherwise comes to SSG's attention. Any Driver whose permit has been suspended, revoked or denied due to a prohibitive medical condition as described above, shall be entitled to a permit upon certification by a medical doctor that the condition is correctable, has been corrected and will continue to be corrected.
- D. In addition to the above, any Driver permit may be suspended or revoked for any crime which is substantially related to the qualifications, functions, or duties of a Driver which include, but are not limited to, the following: reckless driving; wet reckless driving; murder; rape; vehicular manslaughter; a violation of California Vehicle Code Sections 20001, 20002, or 20003 or any corresponding substitute Sections; robbery; a violation of California Penal Code Section 314 or any corresponding substitute Section; pandering; crimes related to the use, sale, possession,

or transportation of narcotics or intoxicating liquors; assault; battery; or indecent exposure.

- E. Any Driver permit may also be suspended for and during the period that the payment of any citation remains outstanding after all appeal periods have been exhausted.
- F. From the time of the revocation or suspension of a Driver permit granted under the provisions of this Chapter, it is unlawful for any person whose Driver's permit has been suspended or revoked to operate or drive a Taxicab within the Jurisdictional Boundaries of SSG until a new permit has been procured or the period of suspension has expired. It is also unlawful for any person to drive or operate within the Jurisdictional Boundaries of SSG any Taxicab during the period of time that a permit has been revoked, terminated or suspended.
- G. In the event the Permittee appeals any denial, suspension, or revocation of a permit issued under this Section, the appeal procedures of Section 1.085 shall apply.

Section 1.085 Appeal Hearings

- A. Any person aggrieved by any determination under the provisions of this Chapter shall be entitled to appeal that decision as provided herein. Any recipient of an administrative citation may contest that there was a regulatory violation or that he or she is the responsible party.
- B. A request for hearing must be made within ten (10) days following the delivery of notice of the decision of the Taxi Administrator which is challenged by delivery of the request for hearing at the administrative offices of SSG together with:
 - 1. An advance deposit of any fine or a notice of request for an advance hardship waiver pursuant to Section 1.090; and
 - 2. Payment of an appeal fee as established by resolution of the Board of Directors.
- C. Upon satisfaction of the foregoing, SSG shall set a hearing within thirty (30) days of delivery of the request for hearing, or as soon thereafter as reasonably practical. The Taxi Administrator shall appoint a hearing officer.
 - 1. If the appeal is of: (1) a decision to deny, suspend, revoke or terminate a permit; or (2) an administrative fine or penalty imposed pursuant to an administrative citation in excess of \$2,000.00, the Taxi Administrator shall refer the matter to the administrative hearing officer under contract with SunLine, or a retired judge or an

administrative law judge with the California State Office of Administrative Law Judges.

2. If the appeal is of a decision to impose a(n) administrative fine(s) or penalty(ies) pursuant to an administrative citation whose total is less than \$2,000.00, the Taxi Administrator shall refer the matter to an employee who shall serve as the hearing officer.
- D. SSG shall notify the appealing party of the time and date for the hearing, which notice shall be delivered at least fifteen (15) days prior to the hearing.
 - E. The hearing officer shall conduct an administrative hearing. The administrative hearing allows SSG and the appealing party to be represented by an attorney, to present evidence related to the alleged violations, to cross examine witnesses who have testified, and to argue their positions. The administrative hearing shall be informal and technical rules of evidence, including but not limited to, the hearsay rule, shall not apply. Oral testimony received at the hearing shall be taken only on oath, affirmation, or penalty of perjury. The right to cross examine witnesses shall not preclude the introduction and consideration of written statements whether made under oath or not. The proceedings shall be recorded or otherwise preserved. It is the intent of SSG that the hearing officer allow wide latitude in introduction of evidence and the holdings and discussions concerning informality of hearings and relaxed rules of evidence set forth in *Mohilef v. Janovici* (1986) 56 Cal.App.4th 310 apply to the fullest extent to all the hearings conducted under this ordinance.
 - F. If the appealing party fails to appear, the hearing officer may conduct the hearing in the party's absence and/or may render a decision to dismiss the matter.
 - G. After consideration of the evidence presented by all parties, the hearing officer shall render written decision which sets forth a statement of the case, any relevant findings of fact to support the decision and administrative enforcement order. If the hearing officer finds one or more of the alleged violations has been committed, he or she may suspend, revoke, or terminate any permit and/or impose administrative monetary penalties in accordance with the limits set forth in this ordinance. In determining whether to suspend or revoke any permit or to impose administrative monetary penalties, the hearing officer shall take into consideration the gravity of the violation, the entire record of the party requesting the hearing, and the harm threatened to the public by the violation.
 - H. The decision of the hearing officer shall be final and the party requesting the hearing shall be notified in writing of the decision of the hearing officer. Such decision shall be delivered within fifteen (15) days from the date the hearing is concluded.

- I. Any review of a decision by the hearing officer brought pursuant to an administrative citation shall be governed by the provisions of Government Code Section 53069.4. Review of any other final decision under this ordinance shall be governed by Code of Civil Procedure Section 1094.5, *et seq.*
- J. With the exception of the conviction of a crime which requires registration as a sex offender under California Penal Code Section 290, in any case where a Driver permit is denied due to a criminal conviction, the applicant shall be entitled to apply the Driver permit application fee towards the appeal fee from such denial. In the event that a Driver permit is granted on such appeal, the applicant shall pay the Driver permit fee in full prior to issuance of a permit.

Section 1.090 Advance Deposit Hardship Waiver

- A. Any person who intends to request a hearing to contest that there was a regulatory violation or that he or she is the responsible party and who is financially unable to make the advance deposit of the fine under Section 1.085, may file a request for an advance deposit hardship waiver.
- B. The request shall be filed with the SSG on an advance deposit hardship waiver application form within ten (10) days of the date of the administrative citation.
- C. The requirement of depositing the full amount of the fine as described in subsection A above shall be stayed unless or until the SSG makes a determination not to issue the advance deposit hardship waiver.
- D. SSG may waive the requirement of an advance deposit set forth in Section 1.085 and issue the advance deposit hardship waiver only if the cited party submits a sworn affidavit, together with any supporting documents or materials demonstrating the person's actual financial inability to deposit with SSG the full amount of the fine in advance of the hearing.

Section 1.095 Administrative Citation

- A. Whenever an enforcement officer charged with the enforcement of any regulation determines that a violation has occurred, the enforcement officer shall have the authority to issue an administrative citation to any person responsible for the violation. In instances in which a Driver is cited for a violation, the Business may also be cited.
- B. Each administrative citation shall contain the following information:
 - 1. The date of the violation;

2. The address or a definite description of the location where the violation occurred;
3. The section of the regulation violated and a description of the violation;
4. The amount of the fine for the violation;
5. A description of the fine payment process, including a description of the time within which and the place to which the fine shall be paid;
6. An order prohibiting the continuation or repeated occurrence of the violation described in the administrative citation;
7. A description of the administrative citation review process, including the time within which the administrative citation may be contested and the place from which a request for hearing form to contest the administrative citation may be obtained; and
8. The name and signature of the citing enforcement officer.

Section 1.200 **Fines and Penalties**

- A. The fine for violation of Article I of this Chapter shall be between one hundred dollars (\$100.00) and one thousand dollars (\$1,000.00).
- B. The minimum fine for operating a Taxicab without a valid permit(s) to operate issued by SSG shall be five thousand dollars (\$5,000.00).
- C. The amount of the fine shall be set forth in the schedule of fines established by resolution of SSG and paid to SSG within thirty (30) days from the date of the administrative citation.
- D. If the fine is challenged by an administrative hearing as set forth in Section 1.085 and the hearing officer determines that the administrative citation shall be upheld, then the fine amount on deposit with SSG shall be retained by SSG.
- E. If after a hearing under Section 1.085, the hearing officer determines that the administrative citation should be upheld and the fine has not been deposited pursuant to an advance deposit hardship waiver, the fine shall be due within thirty (30) days of the date of the decision of the hearing officer is deposited in the mail. Failure to pay the fine within such period shall result in the suspension of the Driver permit of the Driver or Business, as may be applicable, until such time as payment is made.
- F. If after a hearing under Section 1.085 the hearing officer determines that the administrative citation should be canceled and the fine was deposited

with SSG, then SSG shall promptly refund the amount of the deposited fine, together with interest at the rate of five percent (5%) per annum for the period of time that the fine amount was held by SSG.

- G. Payment of a fine under this Chapter shall not excuse or discharge any continuation or repeated occurrence of the regulatory violation that is the subject of the administrative citation.

Section 1.205 Late Payment Charges

- A. Any person who fails to pay to SSG any fine or other payment imposed pursuant to the provisions of the ordinance of SSG on or before the date that fine or payment is due also shall be liable for the payment of any applicable late payment charges set forth in the schedule of fines. In addition, the permit of the Driver or Business involved may be suspended pending payment.

Section 1.210 Cost Recovery

- A. SSG may collect any past due administrative citation fine or late payment charge by use of all available legal means.
- B. SSG may collect any past due Business Permit Fees, Vehicle Permit Fees or any other fees established in this ordinance by use of all available legal means.
- C. SSG may recover its collection costs, including any reasonable attorneys' fees.

Section 1.215 Airports

- A. Nothing in this Chapter shall prevent Palm Springs Regional Airport or any other publicly owned airport from regulation of taxicab access or from charging access/permit fees.

ARTICLE II

OPERATING REQUIREMENTS

Section 2.010 Taxicab Businesses Distinct Appearance

- A. All Taxicabs operating under a Taxicab Business permit shall be of distinctive name and appearance such as is in common usage in this country for Taxicabs and shall have a standard monogram, insignia, or logo which is permanently affixed to each vehicle and clearly indicates that the vehicle is offered for the use of transportation of passengers for hire. Distinctive appearance may include the original factory paint color.
- B. No Taxicab Business permit shall be granted to any Person and/or company whose name, monogram, logo or insignia to be used on its Taxicabs is in conflict with, or imitates, any name, monogram, logo or insignia used by another Taxicab Business within the Jurisdictional Boundaries of SSG in such a manner as to be misleading to, or which would tend to deceive or defraud the public. This includes the consideration of a specific color referenced in the Taxicab Business' name.
- C. No Taxicab Business shall be entitled to utilize the name or telephone number of any previously operating Taxicab Business unless the assuming company has paid all fines, Business Permit Fees, Vehicle Permit Fees, and administrative penalties due to SSG from the previous Taxicab Business and otherwise complied with the requirements for issuance of a Taxicab Business permit under the ordinance of SSG. In any case where an administrative or other form of proceeding is pending against the previous Taxicab Business, no transfer of the name shall occur unless and until SSG is provided with adequate monetary assurance of payment of any anticipated monetary penalty. Assurance may be in the form of a bond or undertaking.

Section 2.015 Advertisements

- A. No Taxicab Business, Driver or any other person shall place or cause to be placed any advertisement which:
 - 1. Is misleading to, or would tend to deceive or defraud the public;
 - 2. Uses a name(s) other than the name(s) registered with SSG for which a valid taxicab business permit has been issued without first obtaining written consent of SSG; or
 - 3. Uses a name, monogram, logo or insignia which is in conflict with or imitates any monogram, logo or insignia used by any other person operating in the Jurisdiction Boundaries of SSG.

Section 2.020 Driver Standards and Appearance

- A. All drivers shall have in his or her immediate possession a valid California driver's license and a Driver permit issued by SSG while in charge of or driving a Taxicab and shall present either upon request.
- B. All Drivers shall be at least 18 years old.
- C. All Drivers shall have the ability to read signs, labels, work schedules, rate cards, information cards, maps and simple instructions in English, to understand and follow verbal directions in English, to write simple instructions in English and to speak English sufficiently to communicate clearly with the public at large.
- D. No Driver shall be afflicted with either a physical or mental incapacity or ailment that would preclude him or her from safely operating a Taxicab and performing the duties normal to such profession.
- E. All Drivers shall be well groomed and dressed in a neat and clean fashion at all times while on duty. At a minimum, attire shall include a collared shirt or blouse covering the shoulders, knee length shorts or skirt or long pants and closed toe shoes. T-shirts, spaghetti or strapless shirts, open toe shoes, flip flops, sweatpants and sandals are prohibited. A Driver shall wear an identification badge at all times while on duty. At a minimum, the shirt, blouse or identification badge worn by the Driver must bear the Driver's name and Business logo.
- F. All Drivers shall provide prompt, efficient service and be courteous at all times to the general public, the business community, all other Taxicab Drivers and SSG or local government administrators/officers. Disputes with the general public, the business community, other taxicab drivers and those in charge of taxicab stands on private property shall be resolved in a professional manner with a goal of maintaining a favorable public image for the taxicab industry.
- G. Smoking and the use of profanity is prohibited.
- H. No Driver shall refuse to transport wheelchairs, packages, luggage and animals as follows:
 - 1. Any passenger's wheelchair, which can be folded and placed in either the passenger vehicle or trunk compartment of the Taxicab;
 - 2. Groceries or packages when accompanied by a passenger;
 - 3. Personal luggage, possessions or small pets in appropriate carriers.

4. Any passenger's service animal or intentionally interfere with the use of service animal by harassing or obstructing the user of his or her service animal as defined by the Americans with Disabilities Act (ADA).
- I. All Drivers shall assist a passenger in and out of a Taxicab when requested, provided the driver is not required to lift the passenger.
- J. All Drivers shall assist a passenger by placing luggage, packages and wheelchairs in and out of the taxicab when requested.
- K. No Driver shall refuse a dispatch call or other request for Taxicab service to transport any passengers who present themselves in a sober and orderly manner and for a lawful purpose.
- L. All Drivers shall be adequately rested, and shall not operate a Taxicab for more than ten (10) consecutive hours, nor for more than ten (10) hours spread over a total of fifteen (15) consecutive hours. Thereafter, no Driver shall drive a Taxicab until eight consecutive hours have elapsed.
- M. All Drivers shall not engage in conduct or verbally threaten to engage in conduct which is dangerous or violent such that the safety of the traveling public, SSG employees or agents, taxicab drivers or other persons, is implicated.
- N. All Drivers shall not engage in argumentative or discourteous conduct toward the public, a passenger, other taxicab drivers or other persons while on call to provide taxicab service or in the course of providing such service.
- O. All Drivers shall not have been convicted of any of the crimes within the timeframes as set forth in Section 1.080 of this Chapter, whether committed in the State of California or elsewhere. A conviction within the meaning of this Section means a plea or verdict of guilty or a conviction following a plea of nolo contendere.
- P. In the event that a Driver is involved in a collision with another vehicle, a fixed object or a pedestrian, that results in injury and/or renders any vehicle inoperable, the Driver and/or the Permittee shall complete and submit to SSG a written SSG approved Collision/Injury Report within twenty four (24) hours of the incident.

Section 2.025 Special Events

- A. As a matter of public safety and efficiency, during certain designated events where there is expected to be heavy concentration of customers seeking taxicab service, no passenger appointments will be allowed for pick-ups

from the event. The designated events to which this regulation applies include:

1. The Coachella Valley Music and Arts Festival;
2. The Stagecoach Festival; and,
3. Any other event for which Permittees are provided written notice no less than thirty (30) days before the event.

Section 2.030 Taxi Administrator

- A. The Taxi Administrator or his/her designee may adopt, by ordinance, operating requirements for Taxicab Businesses and Taxicab Drivers that do not relate to permitting or business licensing pursuant to Government Code Section 53075.51.

Section 2.035 Fines and Penalties

- A. The minimum fine for violation of Article II of this Chapter shall be one hundred dollars (\$100.00).

RIV #4847-8426-5694 v2

ORDINANCE NO. 2024-02
AN ORDINANCE OF SUNLINE SERVICES GROUP
SUPERSEDING ORDINANCE NO. 2024-01

WHEREAS, Government Code Section 53075.5 requires every city and county to protect the public health, safety and welfare by adopting an ordinance concerning the provision of taxicab services, to provide a policy for entry into the business of providing taxicab services, to establish maximum rates for the provision of such services, and for such other matters as determined by the legislative body; and,

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

WHEREAS, members of STA have delegated the authority to regulate the safe operation of taxicab services to SunLine Services Group (SSG); and

WHEREAS, to modernize the regulation of taxicab transportation services and in order for taxicabs to better compete with all for hire modes of transportation the State amended Government Code Section 53075.5 through Assembly Bill 1069 and Assembly Bill 939; and,

WHEREAS, SSG intends to adopt procedures compliant with Assembly Bill 1069 and Assembly Bill 939 for the regulation of taxicab transportation services in the Coachella Valley.

NOW, THEREFORE, the Board of Directors of SSG does ordain as follows:

SECTION 1: ADOPTION OF TAXICAB SERVICE ORDINANCE.

SSG hereby adopts this ordinance regulating taxicabs within the jurisdictional boundaries of SSG, superseding and replacing Ordinance 2024-01, as attached hereto as Exhibit A.

SECTION 2: SEVERABILITY.

If any section, subsection, sentence, clause or phrase of this ordinance is for any reason held to be invalid or unconstitutional by the decision of a court of competent jurisdiction, such decision shall not affect the validity of the remaining portions of the ordinance of SSG. The Board of Directors of SSG hereby declares that it would have passed this ordinance, and each section, subsection, clause, sentence or phrase thereof, irrespective of the fact that any one or more other sections, subsections, clauses, sentences, or phrases may be declared invalid or unconstitutional.

SECTION 3: EFFECTIVE DATE.

This ordinance shall take effect twenty (20) days from its passage by the Board of Directors of SSG.

SECTION 4: PUBLICATION.

The Clerk of the Board is authorized and directed to cause this ordinance to be published within fifteen (15) days after its passage in a newspaper of general circulation and circulated within the jurisdictional boundaries of SSG in accordance with Government Code Section 36933(a) or, to cause this ordinance to be published in the manner required by law using the alternative summary and posting procedure authorized under Government Code Section 36933(c).

INTRODUCED at the regular meeting of the Board of Directors of SunLine Services Group on the 23rd day of October, 2024.

APPROVED AND ADOPTED by the Board of Directors of SunLine Services Group at a regular meeting held on 4th day of December, 2024.

Nancy Ross
Chairperson of the Board

ATTEST:

Edith Hernandez
Clerk of the Board

APPROVED AS TO FORM:

Catherine Groves
General Counsel

EXHIBIT A: TAXICAB SERVICE ORDINANCE

CHAPTER ONE

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PERMITTING OF TAXICAB BUSINESSES AND DRIVERS**

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- 1.015 Definitions and Statutory References
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CHAPTER ONE

ARTICLE I

PERMITTING OF TAXICAB BUSINESSES AND DRIVERS

Section 1.010 Purpose

State law requires every city or county to adopt an ordinance or resolution in regards to taxicab transportation services, which include, among others, a policy for entry into the business, establishment of registration rates, and mandatory controlled substance and alcohol testing programs. In October 2017, Assembly Bill 1069 was enacted to modernize the regulation of taxicab transportation services in order for taxicabs to better compete with all for hire modes of transportation. In September, 2018, Assembly Bill 939 was subsequently enacted imposing additional duties on local governments related to taxicab transportation services. This ordinance establishes a permitting process and regulatory structure consistent with the requirements of state law.

Section 1.015 Definitions and Statutory References

As used in this Chapter:

- A. "AB 1069" means Assembly Bill 1069 *Local government: taxicab transportation services* as codified in Government Code Sections 53075.5, 53075.51, 53075.52 and 53075.53.
- B. "AB 939" means Assembly Bill 939 *Local government: taxicab transportation services* amending Government Code Sections 53075.5, 53075.51, and 53075.52.
- C. "Advertisement" means the dissemination in any newspaper, circular, form letter, brochure, business card, telephone directory (including the yellow and/or white pages) or similar publication, display, sign, internet, phone and/or tablet "app", radio broadcast, telecast of by other electronic means, information designed to promote the use of a Taxicab Business' services.
- D. "Alternative Fuel Vehicle" means vehicles and engines that are designed for alternative fuels including but not limited to hydrogen, natural gas, propane; alcohols such as ethanol, methanol, and butanol; vegetable and waste-derived oils; and electricity.
- E. "Board" or "Board of Directors" means the Board of Directors of SunLine Services Group.
- F. "Business" means any person, firm, association, corporation, partnership or other entity that is established to operate or lease one or more taxicabs within the jurisdictional boundaries of SSG that is issued a permit by the Taxi Administrator pursuant to this ordinance.

- G. "Business Permit" means the permit issued by SSG to a business authorizing the business to operate taxicab services in the jurisdictional boundaries of SSG.
- H. "Business Permit Fee" means the fees charged for issuance of the business permit.
- I. "Business Permit Application Fee" means the fees charged for the review of an application for a Business Permit prior to issuance.
- J. "Control Person" means any person, firm, association, corporation, partnership, owner, investor, shareholder, officer and director that has or have a majority interest in the Taxicab Business.
- K. "Driver" means an individual natural person who drives or is allowed to drive a taxicab under the name of a business. This includes, but is not limited to: full time, regularly employed drivers; casual intermittent or occasional drivers; leased drivers and independent, owner-operator contractors who are either directly employed by or under lease to a business or who drive or operate a taxicab at the direction of or with the consent of a business.
- L. "Engaged with a Passenger" means ongoing interactions between the Driver and passenger during the course and scope of providing taxicab service to the passenger.
- M. "Jurisdictional Boundaries of SSG" means the territory within the jurisdictional boundaries of the cities of Desert Hot Springs, Palm Springs, Cathedral City, Rancho Mirage, Palm Desert, Indian Wells, La Quinta, Indio, Coachella, and the unincorporated area of Riverside County that is within the territorial boundaries of the Palm Springs and Desert Sands Unified School District, and that portion of the Coachella Valley Unified School District located within Riverside County, as such boundaries may be adjusted from time to time as allowed for under the law.
- N. "Permittee" means any business including any owners, investors, shareholders, partners, officers, directors and representatives acting on its behalf or driver that has been issued a permit pursuant to the Article I.
- O. "Prorated" means a pro rata distribution based on the date of business, driver or vehicle permit issuance.
- P. "Pull Notice Program" as referred to in Vehicle Code Section 1808.1 shall mean a process for the purpose of providing the employer with a report showing the Driver's current public record by the Department of Motor Vehicles and any subsequent convictions, failures to appear, accidents, driver's license suspensions, driver's license revocations, or any other actions taken against the driving privilege or certificate, added to the driver's

record while the employer's notification request remains valid and uncanceled.

- Q. "Per Mile" means the charge to a taxicab passenger calculated and based on distance traveled by the taxicab vehicle.
- R. "SSG" means the joint powers authority established by Riverside County and Coachella Valley cities charged with the duties, obligations and responsibilities to implement and enforce this ordinance and any related ordinance and any regulations promulgated pursuant thereto as directed by the SSG Board.
- S. "Substantially Located" shall have the same meaning as defined within Government Code Section 53075.5.
- T. "Taxicab" means every automobile or motor propelled vehicle, designed for carrying not more than eight persons, excluding the driver, where the driver's seat may be separated from the passenger's compartment by a glass or other partition used for the transportation of passengers for hire over the public streets in the jurisdictional boundaries of SSG, and not over a defined route, irrespective of whether the operations extend beyond the jurisdictional boundaries, in circumstances where the vehicle is routed under the direction of the passenger of the person hiring the same.
- U. "Taxi Administrator" means the General Manager of SSG or his/her designee.
- V. "Vehicle Permit" means a valid permit issued by SSG, authorizing a particular vehicle to be operated as a Taxicab.
- W. "Vehicle Permit Fee" means a non-transferable authorization to drive or operate a vehicle as an authorized Taxicab transportation service within the jurisdictional boundaries of SSG, whether as owner, lesser, lessee, or otherwise.

As used in this Chapter, any citation or reference to a California code or statute is intended to include any subsequent amendments enacted by the state thereto.

Section 1.020 Taxi Administrator

- A. The Taxi Administrator shall be authorized to carry out the permitting and regulation of Businesses and Drivers under this Chapter, and to enforce the provisions of this Chapter in compliance with California Government Code sections 53075.5 and 53075.51. The Taxi Administrator is authorized to promulgate and adopt regulations and procedures necessary to implement all provisions of this Chapter.

- B. The Taxi Administrator shall be authorized to conduct investigations, audits or field inspections in order to enforce the provisions of this Chapter and regulations.

Section 1.025 Delivery of Notices or Requests

- A. All notices or requests referred to in this ordinance shall be delivered to the Administrative Office of SSG. All notices or requests referred to in the ordinance of SSG to any business or individual shall be delivered to the address of record for the business or individual.
- B. Notices or requests referred to in this ordinance may be delivered through electronic mail to the address provided in the application for a Business, Driver or Vehicle Permit.
- C. Delivery of any notice or request shall be effective as follows:
 - 1. Immediately if given by personal delivery or electronic mail;
 - 2. One (1) day after delivery if delivered by an overnight delivery service; and
 - 3. Three (3) days after delivery if delivered by U.S. Mail.

Section 1.030 Business Permit Required

- A. It is unlawful for any business to operate a Taxicab or Taxicabs without first having been issued a Business Permit from SSG if the Business is substantially located within the Jurisdictional Boundaries of SSG.
- B. A Business Permit may be obtained from SSG as provided below. The Permit shall state the name of the Taxicab Business, location of principal operation, and the date of issuance. If the Taxicab Business and the Driver are the same person, he or she shall apply for and obtain from SSG both a Business Permit and a Driver permit.
- C. An applicant for a Business Permit shall complete an application form which shall contain the following information:
 - 1. Name of Business as recorded in formation documents filed with the California Secretary of State or fictitious business name as registered with Riverside County;
 - 2. Name, job title, and function of all owners, investors, shareholders, partners, officers, directors and representatives acting on the Business' behalf and provide such information as is required to evaluate the legitimacy of the company's business structure, qualifications, corporate stability, financial stability and capability;

3. Fingerprint based criminal history check of all owners, investors, shareholders or partners that hold an interest in the Taxicab Business;
4. Address of principal place of business from which the Business conducts its activities;
5. Address of all locations from which the Business conducts its activities;
6. Electronic mail address for the purpose of providing notice or requests.
7. Before any Business Permit is issued, the applicant shall procure and maintain, at its cost, comprehensive general liability and property damage insurance, against all claims for injuries against persons or damages to property which may arise from or in connection with the operation of Taxicabs by the applicant, its agents, representatives, employees, or subcontractors and the owner of the vehicle;
8. A list of the Vehicle Identification Numbers (“VIN”) of the Taxicabs (“vehicle identification list”) which have annually passed a vehicle safety inspection at a facility certified by the National Institute for Automotive Service Excellence or a facility registered with the Bureau of Automotive Repair. The list shall include vehicle number, license plate number, and SSG permit number;
9. A current list of all Drivers authorized to operate any vehicle on the required vehicle identification list;
10. Evidence of valid and current California Department of Motor Vehicle Registration for each Taxicab listed in the vehicle identification list;
11. Verification of safety and education program as required by Government Code Section 53075.5;
12. Verification of disabled access education program as required by Government Code Section 53075.5;
13. Verification of participation in the Pull-Notice Program pursuant to Section 1808.1 of the California Vehicle Code;
14. Each applicant shall submit information establishing the total number of prearranged and non-prearranged trips that originate within the Jurisdictional Boundaries of SSG accounting for the largest share of the Business' total number of trips over the applicable time period pursuant Government Code Section 53075.5; and,

15. Each applicant shall provide SSG an address of an office or terminal where documents supporting the factual matters specified in Government Code Section 53075.5 may be inspected by SSG upon request.
- D. The Business Permit shall be valid for a period of one (1) year, beginning July 1st of each year and expiring June 30th or until suspended, revoked or surrendered. Requirements to approve and maintain the permit include:
1. Taxicab Businesses shall have a distinctive name and appearance and shall have a standard monogram, insignia, or logo which is permanently affixed to each vehicle and indicates that the vehicle is offered for the use of transportation of passengers of hire. Distinctive name includes consideration of a specific color referenced in the Taxicab Business' name and distinctive appearance may include the original factory paint color;
 2. Maintenance of a year-round computerized dispatch system capable of providing performance reports as required by Government Code Section 53075.5 and the Taxi Administrator;
 3. At least one (1) wheelchair-accessible van that meets federal standards as provided in Title 49, Subtitle A, Part 38 of the Code of Federal Regulations ready and available as may be requested in its fleet;
 4. Proof of insurance per section 1.040;
 5. Compliance with the maximum rates established per section 1.070;
 6. Implementation of mandatory controlled substance and alcohol testing program per section 1.075;
 7. Maintenance of safety education and training program;
 8. Maintenance of disabled access education and training program;
 9. Maintenance of current and valid California Department of Motor Vehicles Registration for each Taxicab listed in the vehicle identification list;
 10. Continuous participation in the Pull Notice Program per Vehicle Code Section 1808.1; and,
 11. Compliance with all operational requirements in Article II of this Chapter.

- E. Each Taxicab Business shall at all times maintain accurate and complete accounts of all revenues and income arising out of its Taxicab operations, a list of vehicles in use, a list of all Drivers of the company, any complaints by patrons and any other information SSG may require to verify compliance with the ordinance of SSG. The Taxicab Business' books, accounts and records pertaining to compliance with the ordinance of SSG shall at all reasonable times be open to inspection, examination and audit by the authorized officers, employees and agents of SSG. The refusal of a Taxicab Business to provide the required records for inspection shall be deemed a violation of the ordinance of SSG and cause for termination of the Taxicab Business permit. Any proprietary data provided to SSG shall be maintained confidential to the extent permitted by law.
- F. At the time the application for a Business Permit is received, the applicant shall pay a Business Permit Application Fee as established and amended from time to time by resolution of the Board. Fees shall be due and payable before a Business Permit application is processed. Prorated fees will be based on the date of Business Permit approval.
- G. At the time the application for a Business Permit is received, it will be reviewed for accuracy and compliance within ten (10) days. The applicant will receive a deficiency notice should the application and documents be lacking and/or incomplete. The applicant shall have thirty (30) days from the date of deficiency notice to remedy and re-submit application deficiencies. Applications that have not met the minimum requirements for a Business Permit within sixty (60) days will be denied. A new Business Permit application must be submitted for consideration, thereafter.
- H. At the time a Business Permit Application is approved, the applicant shall pay the Annual Taxicab Business Permit Fee. The Annual Taxicab Business Permit Fee shall be due and payable before issuance of a Business Permit. The Annual Taxicab Business Permit Fee may be adjusted by resolution of the Board.
- I. The Board may establish a procedure for a payment of the Business Permit Fee in installments.
- J. The rights of appeal provided for by Section 1.085 are available to a Business in the event that his or her Business Permit is denied based on the provisions of this Chapter.
- K. In the event a Taxicab Business or any Control Person transfers 50% or more of its interest in the Business therein, the Taxicab Business' Permit cannot be sold or transferred in part or in whole, by assignment, trust, mortgage, lease, sublease, pledge or other hypothecation without prior written consent of the Board.

Section 1.035 Business Permit Renewal

- A. Sixty (60) days prior to the expiration of a Business Permit the Business may apply to SSG for a renewal thereof for an additional year. A Business shall be entitled to a one (1) year renewal of the Business Permit provided that:
 - 1. The Business submits a Business Permit renewal application;
 - 2. The Business pays the annual renewal application fee;
 - 3. The Business pays the Business Permit Fee;
 - 4. The Business pays the applicable Taxicab Vehicle Permit Fee;
 - 5. The Business shows that it continues to be substantially located within the Jurisdictional Boundaries of SSG as defined in Government Code Section 53075.5;
 - 6. The Business continues to comply with all provisions of Section 1.030.

- B. The rights of appeal provided for by Section 1.085 are available to a Business in the event that renewal of his or her Business Permit is denied based on the provisions of this Chapter.

Section 1.040 Insurance Required

- A. The insurance policies required under this Chapter shall consist of and contain or be endorsed to contain the following provisions:
 - 1. General Liability and Automotive Liability Coverage:
 - a. SSG, its member entities, their officers, officials, employees, and volunteers are to be covered as additional insureds for liability related to:
 - i. Activities performed by or on behalf of the Business;
 - ii. Premises owned, occupied, or used by the Business; and,
 - iii. Automobiles owned or leased by the Business.
 - b. The Permittee shall also carry Workers' Compensation Insurance in accordance with State of California Workers' Compensation laws.

- c. The coverage shall contain no special limitations on the scope of protection afforded to SSG, its member entities, their officers, officials, employees, agents, representatives, or volunteers.
- d. The business' insurance shall be the primary insurance of SSG, its member entities, their officers, officials, employees, agents, representatives and volunteers. Any insurance or self-insurance maintained by SSG, its member entities, their officers, officials, employees, agents, representatives or volunteers shall be in excess of the Permittee's insurance and shall not contribute with it.
- e. Any failure to comply with reporting provisions of the policy shall not affect coverage provided to SSG, its member entities, their officers, officials, employees and agents.
- f. Permittee's insurance shall apply separately to each insured against whom a claim is made or a suit is brought, except with respect to the limits of the insurer's liability.

2. All Coverage:

- a. Each insurance policy required by this Section shall be endorsed to state that coverage shall not be suspended, voided, cancelled by either party, reduced in coverage or in limits except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to SSG.
- b. Permittee shall furnish SSG with a certificate of insurance and any applicable policies and endorsements affecting the coverage required hereunder. The policies and endorsements are to be signed by a person authorized by that insurer to bind coverage on its behalf. At SSG's option, endorsements and any certificates of insurance required by SSG shall be on forms provided or approved by SSG. All endorsements and certificates are to be received and approved by SSG prior to the operation of any Taxicab by the Permittee in the Jurisdictional Boundaries of SSG. SSG reserves the right to require complete certified copies of all insurance policies, including endorsements affecting the coverage required by this ordinance, at any time and shall include, but not limited to, the obligation to indemnify, hold harmless, release and defend SSG.

- c. Business Permittee shall include all individual Drivers employed by Permittee, agents, contractors, other sub-operators as may be permitted by SSG, as insureds under its policies or shall furnish separate certificates and endorsements for each sub-operator. All coverage for such sub-operators shall be subject to all of the requirements stated herein.
 - d. The procuring of such insurance or the delivery or endorsements and certificates evidencing the same shall not be construed as a limitation of the Permittee's obligation to indemnify, hold harmless, release and defend SSG, its member entities, their officers, officials, employees, agents, representatives, and volunteers from and against any and all liability, claims, suits, costs, expenses, fines, judgments, settlements, charges or penalties, including reasonable attorney's fees, regardless of the merit or outcome of the same arising out of, or in any manner connected with, any or all of the operations or services authorized conducted or permitted under this ordinance.
 - e. The amount of insurance required hereunder shall be as follows:
 - i. For injury or death in any one accident or occurrence, three hundred fifty thousand dollars (\$350,000.00);
 - ii. For the injury or destruction of property in any one accident or occurrence, three hundred fifty thousand dollars (\$350,000.00);
 - iii. For combined single limits of liability for primary bodily injury and primary property damage, three hundred fifty thousand dollars (\$350,000.00);
 - iv. For employer's liability, with limits of three hundred fifty thousand dollars (\$350,000.00).
 - f. It shall be the responsibility of all Permittees to provide and maintain insurance coverage in compliance with the provisions of this ordinance to cover each and every driver that operates a vehicle as a Taxicab. The Permittee shall further ensure that appropriate certificates of insurance reflecting the coverage are on file with SSG at all times.
3. Insurance required by this Section shall be satisfactory only if issued by companies having at least an A insurance rating on AM Best or

equivalent, and are authorized to write business in California. All applicants are required to comply with this Section prior to the issuance of any Business Permit.

4. Permittees are responsible to ensure compliance with all of the foregoing insurance requirements and regulatory provisions related to such requirements. Responsibility on the part of the Permittee includes ensuring that any vehicle owner whose vehicle is operated under the Business Permittee's name maintains insurance and provides SSG with proof of the same at all times that each vehicle is operated. Failures to comply with the foregoing insurance requirements which affect the Business as a whole shall result in immediate suspension of the permit. Failure to comply with the foregoing insurance requirements three (3) times within a calendar year constitutes grounds for revocation of the permit.
- B. Permittees shall maintain on file with SSG evidence of its insurance coverage meeting all the requirements as indicated in this Section. The Permittee shall provide SSG with verbal notice within 24 hours in the event of any change in insurance coverage and written notification of any insurance change within three (3) calendar days after the change.

Section 1.045 Driver Permit Required

- A. It is unlawful for any person to drive a Taxicab without having first obtained a Driver permit from SSG. A Driver permit may be obtained as provided below.
- B. An applicant for a Driver permit shall complete an application which shall contain the following information:
1. Applicant's full name, residence address and age;
 2. A listing of all equivalent permits which have been issued to the applicant by any governmental agency;
 3. Applicant's height, weight, gender and color of eyes and hair;
 4. The number and expiration date of the applicant's California driver's license;
 5. All moving violations within the last 3 years, including dates of violations and the jurisdiction where each violation occurred;
 6. Authorization for SSG, or its agents or employees to seek information and conduct an investigation into the truth of the statements set forth in the application and the qualifications of the applicant; and

- C. The Taxi Administrator may accept the submission of a permitted Business' Driver application that provides all the information required in subsection B above in lieu of the Driver application provided by SSG.
- D. At the time the applicant submits an application for a Driver permit, the applicant shall do all of the following:
 - 1. Submit to a fingerprint based criminal history check pursuant to Government Code Section 53075.5;
 - 2. Provide SSG with a copy of the results of the drug and alcohol test as conducted by the Business pursuant to Government Code Section 53075.5 and Section 1.075 of this ordinance;
 - 3. Provide proof of insurance as insureds under an employer's policies as required by Section 1.040;
 - 4. Provide proof of completion for taxi business's driver safety education and training program;
 - 5. Provide proof of completion for taxi business's disabled access education and training program;
 - 6. Provide Intent to Hire form indicating the name of the Business with whom the applicant is employed or who has given the applicant an offer of employment within the meaning of Government Code Section 53075.5;
 - 7. Provide SSG with a copy of the Department of Motor Vehicles Pull Notice Program enrollment, as defined in Vehicle Code Section 1808.1; and
 - 8. Payment of Driver permit fee as established and amended from time to time by resolution of the Board. The Driver permit fee shall be due and payable before receipt of the driver permit.
- E. The Driver permit shall state the name of the employer.
- F. In the event of denial, revocation or suspension of a Driver permit, the applicant may within ten (10) days of notification of denial apply to SSG for a hearing on the denial in accordance with the procedures set forth in Section 1.085.
- G. The Driver permit shall be valid for a period of one (1) year or until suspended, revoked or surrendered. Termination of the Driver's California driver's license shall constitute grounds for revocation of the Driver permit authorized hereunder.

- H. Upon termination of employment within the meaning of Government Code Section 53075.5 the permit shall become void. In such case, the Driver shall immediately return the Driver permit to SSG. Upon return of the Driver permit, the Driver may re-apply for a Driver permit, provided that the Driver complies with the requirements for issuance of a Driver permit under this Section.

Section 1.050 Driver Permit Renewal and Transfer

- A. Prior to the expiration of a Driver permit, the Driver may apply to SSG for a renewal thereof for an additional year. A Driver shall be entitled to a one (1) year renewal of the Driver permit provided that:
1. The Driver submits a completed renewal application which shall contain the information stipulated in Section 1.045, subsection B.
 2. The Driver pays a permit renewal fee as established and amended from time to time by resolution of the Board;
 3. The Driver submits to permit-renewal controlled substances and alcohol testing as provided by Government Code Section 53075.5;
 4. The results of controlled substances and alcohol testing indicate that the Driver has not been using a controlled substance as specified in Part 40 (commencing with Section 40.1) of Title 49 of the Code of Federal Regulations;
 5. The results of such testing indicate that the Driver has a breath concentration of less than 0.02 percent on an alcohol screening test; and,
 6. The Driver has not been convicted of any of the crimes, including but not limited to, those crimes enumerated in Section 1.080 during the preceding year.
- B. A Driver may request a transfer of his/her Driver Permit to another Permittee provided the Driver has submitted the following:
1. A Driver permit application signed by an authorized representative of the prospective Permittee;
 2. Intent to Hire Form;
 3. A copy of the results of the drug and alcohol test as conducted by the Business pursuant to Government Code Section 53075.5 and Section 1.075 of this ordinance;

4. Proof of insurance as insured under a Business' policy as required by Section 1.040;
 5. Proof of completion for taxi business's driver safety education and training program;
 6. Proof of completion for taxi business's disabled access education and training program;
 7. A copy of the Department of Motor Vehicles Pull Notice Program enrollment, as defined in Vehicle Code Section 1808.1;
 8. A Driver permit transfer fee; and
 9. SSG Driver permit to be transferred.
- C. Driver shall not operate a Taxicab until the transfer permit is obtained and in possession of the Driver pursuant to this Section.
- D. A transferred Driver permit shall expire on the same date as the original Driver Permit and shall not exceed the Driver's permit period.
- E. If the Driver permit has expired or terminated and is not renewed or transferred within thirty (30) business days of the expiration or termination, the Driver shall be required to re-apply as a new applicant for issuance of a Driver permit and shall pay all fees associated therewith.
- F. The rights of appeal provided for by Section 1.085 are available to a Driver in the event that renewal of his or her Driver permit is denied based on the provisions of this Chapter.

Section 1.055 Vehicle Permit Required

- A. It is unlawful for any Taxicab to operate without first having been issued a Vehicle Permit from SSG, unless otherwise authorized by Government Code section 53075.5. At all times while providing Taxicab service, the Vehicle Permit must be affixed to the lower left rear windshield of the vehicle.
- B. A Vehicle Permit may be issued provided that the vehicle has successfully completed a safety and cosmetic inspection conducted by a facility certified by the National Institute for Automotive Service Excellence or a facility registered with the Bureau of Automotive Repair in accordance with the vehicle safety standards.
- C. The Vehicle Permit shall be valid for a period of one (1) year, beginning July 1st of each year and expiring June 30th or until suspended, revoked or surrendered.

- D. The Vehicle Permit Fee shall be due and payable upon the issuance of a Vehicle Permit. Permittees shall pay the Vehicle Permit Fee for each vehicle that is issued a Vehicle Permit.
- E. 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.
- F. If a Taxicab Business' Business Permit is suspended or terminated pursuant to section 1.080, all corresponding Vehicle Permits shall also be suspended. Owners of all vehicles with a suspended Vehicle Permit shall present vehicles to SSG for out of service Taximeter readings immediately upon suspension or termination of a Taxicab Business or expiration, suspension or termination of the Vehicle Permit sticker. The owner of the vehicle shall have thirty (30) days to register the vehicle with an existing and valid Taxicab Business permit holder. If the owner fails to register the vehicle within such thirty (30) day period, the vehicle shall be presented to SSG for removal of the Vehicle Permit sticker (if such sticker has not already been surrendered) and the balance of the Vehicle Permit Fee owing to SSG for the vehicle shall be immediately due and payable. SSG shall pursue collection of the Vehicle Permit Fee from either the Taxicab Business or the owner of the vehicle and no Vehicle Permit sticker shall be issued to the vehicle regardless of its ownership until the Vehicle Permit Fee owing to SSG shall have been paid.

Section 1.060 Vehicle Permit Renewal

- A. Prior to the expiration of a Vehicle Permit, the Permittee may apply to SSG for a renewal thereof for an additional year. A Vehicle Permit may be entitled to a one (1) year renewal provided that:
 - 1. Payment of the Vehicle Permit Fee as established and amended from time to time by resolution of the Board is received; and
 - 2. All requirements for initial issuance of a Vehicle Permit are maintained as provided in Section 1.055.
- B. The rights of appeal provided for by Section 1.085 are available in the event that renewal of a Vehicle Permit is denied based on the provisions of this Chapter.

Section 1.065 Vehicle Inspections

- A. Prior to obtaining a Taxicab Business Permit, an applicant shall first present each vehicle to be used as a Taxicab to a facility certified by the National Institute for Automotive Service Excellence or a facility registered with the Bureau of Automotive Repair, and SSG, for a vehicle safety and cosmetic

inspection. Any vehicle(s) that a Taxicab Business proposes to add to its fleet shall also be presented to a facility certified by the National Institute for Automotive Service Excellence or a facility registered with the Bureau of Automotive Repair, and SSG, for successful completion of a vehicle safety and cosmetic inspection prior to operation as a Taxicab. The Taxicab Administrator shall maintain a list which reflects the VIN of each vehicle that successfully completes the vehicle safety inspection. A record of the VIN of each vehicle that fails the vehicle safety inspection shall also be maintained by SSG.

- B. In addition to the initial vehicle safety and cosmetic inspection, each vehicle shall be required to pass additional inspections at the following times:
 - 1. Every twelve (12) months from the date the vehicle is first licensed as a Taxicab;
 - 2. After every incident resulting in cosmetic or greater damages; and,
 - 3. At any time upon written request by the Taxi Administrator.
- C. Failure to present a vehicle for inspection under this ordinance within three (3) days of the date upon which a request under Section 1.025 is delivered or within three (3) days after inspection is due shall result in the issuance of a penalty in accordance with Section 1.095. Further failure to present a vehicle for inspection under this ordinance within ten (10) days of the date upon which a written request is delivered or inspection is due shall result in the vehicle being declared presumed unfit to operate as a Taxicab, an administrative citation shall be issued to that effect, and the vehicle shall be read out of service.
- D. It is unlawful to operate a Taxicab vehicle in an unsafe operating condition, including but not limited to a condition that violates the vehicle safety inspection standards of SSG. All Taxicab Businesses are responsible to ensure that their vehicles are maintained in a safe operating condition at all times that they are in service. An incident that results in any cosmetic or greater damage shall be reported to SSG.

Section 1.070 Rates

- A. No Permittee operating in the Jurisdictional Boundaries of SSG may charge a rate in excess of the maximum rate of \$12.00 Per Mile, \$4.00 flag drop/base rate, and \$24.00 per hour for traffic delay or waiting time. Maximum rates may be adjusted by resolution of the Board.
- B. A Permittee may charge a rate that is less than the maximum rate set by SSG. Permittees may set fares or charge a flat rate as made permissible by

Government Code Section 53075.5. No other fees or rates may be charged by a Permittee except as permitted by law.

- C. The Board may from time to time establish maximum flat rates for special events or fixed routes.
- D. A Permittee may use any type of device or technology approved by the Division of Measurement Standards to calculate fares as provided for in Government Code Section 53075.5.
- E. The Permittee shall disclose fares, fees or rates to the customer as provided for in Government Code Section 53075.5.
- F. The Permittee shall notify the passenger of applicable rates prior to the passenger accepting the ride for walk up rides and street hails as provided for in Government Code Section 53075.5.

Section 1.075 Mandatory Controlled Substance and Alcohol Testing Program

- A. Each Permittee shall maintain a mandatory controlled substance and alcohol testing certification program conforming to all requirements as set forth in California Government Code Section 53075.5 and Part 40 (commencing with Section 40.1) of Title 49 of the Code of Federal Regulations.
- B. Each Business shall maintain a written drug and alcohol policy as required by Government Code Section 53075.5 and proof that the Business has implemented a drug and alcohol certification program covering all of its drivers.
- C. No Business shall permit a Driver who refuses to submit to such tests to operate or continue to operate a Taxicab.
- D. In the case of self-employed independent Driver within the meaning of Government Code Section 53075.5, the test results shall be reported directly to SSG. In all other cases, the test results shall be reported to the Business who has employed or made an offer of employment to the Driver within the meaning of Government Code Section 53075.5.
- E. Results of all tests provided for in this Section are confidential and shall not be released to the public without the written consent of the Driver, except as provided by law.

Section 1.080 Denial, Revocation, or Suspension of Permits

- A. In addition to any other reason provided for in this Chapter, a permit may be denied, suspended or revoked when it has been determined that the

Business, including any owners, investors, shareholders, partners, officers, directors, and representatives acting on its behalf:

1. Has not complied with the applicable provisions of Article I; or
2. Has not complied with the applicable provisions of the regulations; or
3. Has failed to cure any item listed in a sixty (60) day warning for failure to comply with any requirements of permit issuance; or
4. Has been issued three (3) sixty (60) day warnings of failure to comply with any requirements of this Chapter within a period of twelve (12) months; or
5. Has knowingly made a false statement of fact in an application for such permit; or
6. Has any outstanding balance owed to SSG; or
7. Has charged rates or fares exceeding the maximum rates other than those permitted by Section 1.070.

B. Business and Driver Criminal Conduct

1. A permit may be denied, suspended or revoked when it has been determined that the Business, including any owners, investors, shareholders, partners, officers, directors, and representatives acting on its behalf or Driver has been convicted of any of the following crimes within the timeframes set forth below, whether committed in the State of California or elsewhere. A conviction within the meaning of this Section means a plea or verdict of guilty or a conviction following a plea of nolo contendere:
 - a. Any conviction regardless of the time elapsed, in any state, of any of the following or their equivalent:
 - i. Any crime (apart from adult same-sex consensual sexual behavior) which requires the applicant to register as a sex offender under California Penal Code §290 shall require denial or revocation; or
 - ii. Any felony involving actual or threatened violence against persons, including, but not limited to, assault, battery, robbery or the use of a firearm or other weapon against a person.
 - b. Any conviction (felony or misdemeanor) within the past seven (7) years of any crime involving theft or dishonesty, including,

but not limited to, burglary, theft, shoplifting or other crime related to fraud or intentional dishonesty; or

- c. Any conviction (felony or misdemeanor) within the past seven (7) years of any crime involving the sale, possession or transportation of narcotics or other controlled substances; or
 - d. Any conviction (misdemeanor or felony) within the past three (3) years of any crime involving pandering or prostitution.
2. In addition to the crimes listed above, no Driver permit shall be granted to an applicant who has been convicted of three (3) or more moving violations within three years previous to submission of the application. Any permit previously granted shall be revoked for any Driver who has been convicted of three (3) or more moving violations within three (3) years.
 3. In addition, if an applicant has been convicted of, or pled nolo contendere at any time within the past seven (7) years, to a violation related to driving under the influence of alcohol or drugs, the applicant shall be disqualified and the application shall be denied. If after issuance of a permit to a Driver, the Driver is convicted of, or pleads nolo contendere to, a violation related to driving under the influence of alcohol or drugs, the Driver's permit shall be revoked.
- C. In addition to the foregoing, a Driver permit may be suspended, revoked or denied in the event that:
1. A driver is involved in an accident due to a medical condition that prevents the Driver from safely operating a vehicle, or;
 2. A medical condition that prevents a Driver from safely operating a vehicle otherwise comes to SSG's attention. Any Driver whose permit has been suspended, revoked or denied due to a prohibitive medical condition as described above, shall be entitled to a permit upon certification by a medical doctor that the condition is correctable, has been corrected and will continue to be corrected.
- D. In addition to the above, any Driver permit may be suspended or revoked for any crime which is substantially related to the qualifications, functions, or duties of a Driver which include, but are not limited to, the following: reckless driving; wet reckless driving; murder; rape; vehicular manslaughter; a violation of California Vehicle Code Sections 20001, 20002, or 20003 or any corresponding substitute Sections; robbery; a violation of California Penal Code Section 314 or any corresponding substitute Section; pandering; crimes related to the use, sale, possession,

or transportation of narcotics or intoxicating liquors; assault; battery; or indecent exposure.

- E. Any Driver permit may also be suspended for and during the period that the payment of any citation remains outstanding after all appeal periods have been exhausted.
- F. From the time of the revocation or suspension of a Driver permit granted under the provisions of this Chapter, it is unlawful for any person whose Driver's permit has been suspended or revoked to operate or drive a Taxicab within the Jurisdictional Boundaries of SSG until a new permit has been procured or the period of suspension has expired. It is also unlawful for any person to drive or operate within the Jurisdictional Boundaries of SSG any Taxicab during the period of time that a permit has been revoked, terminated or suspended.
- G. In the event the Permittee appeals any denial, suspension, or revocation of a permit issued under this Section, the appeal procedures of Section 1.085 shall apply.

Section 1.085 Appeal Hearings

- A. Any person aggrieved by any determination under the provisions of this Chapter shall be entitled to appeal that decision as provided herein. Any recipient of an administrative citation may contest that there was a regulatory violation or that he or she is the responsible party.
- B. A request for hearing must be made within ten (10) days following the delivery of notice of the decision of the Taxi Administrator which is challenged by delivery of the request for hearing at the administrative offices of SSG together with:
 - 1. An advance deposit of any fine or a notice of request for an advance hardship waiver pursuant to Section 1.090; and
 - 2. Payment of an appeal fee as established by resolution of the Board of Directors.
- C. Upon satisfaction of the foregoing, SSG shall set a hearing within thirty (30) days of delivery of the request for hearing, or as soon thereafter as reasonably practical. The Taxi Administrator shall appoint a hearing officer.
 - 1. If the appeal is of: (1) a decision to deny, suspend, revoke or terminate a permit; or (2) an administrative fine or penalty imposed pursuant to an administrative citation in excess of \$2,000.00, the Taxi Administrator shall refer the matter to the administrative hearing officer under contract with SunLine, or a retired judge or an

administrative law judge with the California State Office of Administrative Law Judges.

2. If the appeal is of a decision to impose a(n) administrative fine(s) or penalty(ies) pursuant to an administrative citation whose total is less than \$2,000.00, the Taxi Administrator shall refer the matter to an employee who shall serve as the hearing officer.
- D. SSG shall notify the appealing party of the time and date for the hearing, which notice shall be delivered at least fifteen (15) days prior to the hearing.
 - E. The hearing officer shall conduct an administrative hearing. The administrative hearing allows SSG and the appealing party to be represented by an attorney, to present evidence related to the alleged violations, to cross examine witnesses who have testified, and to argue their positions. The administrative hearing shall be informal and technical rules of evidence, including but not limited to, the hearsay rule, shall not apply. Oral testimony received at the hearing shall be taken only on oath, affirmation, or penalty of perjury. The right to cross examine witnesses shall not preclude the introduction and consideration of written statements whether made under oath or not. The proceedings shall be recorded or otherwise preserved. It is the intent of SSG that the hearing officer allow wide latitude in introduction of evidence and the holdings and discussions concerning informality of hearings and relaxed rules of evidence set forth in *Mohilef v. Janovici* (1986) 56 Cal.App.4th 310 apply to the fullest extent to all the hearings conducted under this ordinance.
 - F. If the appealing party fails to appear, the hearing officer may conduct the hearing in the party's absence and/or may render a decision to dismiss the matter.
 - G. After consideration of the evidence presented by all parties, the hearing officer shall render written decision which sets forth a statement of the case, any relevant findings of fact to support the decision and administrative enforcement order. If the hearing officer finds one or more of the alleged violations has been committed, he or she may suspend, revoke, or terminate any permit and/or impose administrative monetary penalties in accordance with the limits set forth in this ordinance. In determining whether to suspend or revoke any permit or to impose administrative monetary penalties, the hearing officer shall take into consideration the gravity of the violation, the entire record of the party requesting the hearing, and the harm threatened to the public by the violation.
 - H. The decision of the hearing officer shall be final and the party requesting the hearing shall be notified in writing of the decision of the hearing officer. Such decision shall be delivered within fifteen (15) days from the date the hearing is concluded.

- I. Any review of a decision by the hearing officer brought pursuant to an administrative citation shall be governed by the provisions of Government Code Section 53069.4. Review of any other final decision under this ordinance shall be governed by Code of Civil Procedure Section 1094.5, *et seq.*
- J. With the exception of the conviction of a crime which requires registration as a sex offender under California Penal Code Section 290, in any case where a Driver permit is denied due to a criminal conviction, the applicant shall be entitled to apply the Driver permit application fee towards the appeal fee from such denial. In the event that a Driver permit is granted on such appeal, the applicant shall pay the Driver permit fee in full prior to issuance of a permit.

Section 1.090 Advance Deposit Hardship Waiver

- A. Any person who intends to request a hearing to contest that there was a regulatory violation or that he or she is the responsible party and who is financially unable to make the advance deposit of the fine under Section 1.085, may file a request for an advance deposit hardship waiver.
- B. The request shall be filed with the SSG on an advance deposit hardship waiver application form within ten (10) days of the date of the administrative citation.
- C. The requirement of depositing the full amount of the fine as described in subsection A above shall be stayed unless or until the SSG makes a determination not to issue the advance deposit hardship waiver.
- D. SSG may waive the requirement of an advance deposit set forth in Section 1.085 and issue the advance deposit hardship waiver only if the cited party submits a sworn affidavit, together with any supporting documents or materials demonstrating the person's actual financial inability to deposit with SSG the full amount of the fine in advance of the hearing.

Section 1.095 Administrative Citation

- A. Whenever an enforcement officer charged with the enforcement of any regulation determines that a violation has occurred, the enforcement officer shall have the authority to issue an administrative citation to any person responsible for the violation. In instances in which a Driver is cited for a violation, the Business may also be cited.
- B. Each administrative citation shall contain the following information:
 - 1. The date of the violation;

2. The address or a definite description of the location where the violation occurred;
3. The section of the regulation violated and a description of the violation;
4. The amount of the fine for the violation;
5. A description of the fine payment process, including a description of the time within which and the place to which the fine shall be paid;
6. An order prohibiting the continuation or repeated occurrence of the violation described in the administrative citation;
7. A description of the administrative citation review process, including the time within which the administrative citation may be contested and the place from which a request for hearing form to contest the administrative citation may be obtained; and
8. The name and signature of the citing enforcement officer.

Section 1.200 **Fines and Penalties**

- A. The fine for violation of Article I of this Chapter shall be between one hundred dollars (\$100.00) and one thousand dollars (\$1,000.00).
- B. The minimum fine for operating a Taxicab without a valid permit(s) to operate issued by SSG shall be five thousand dollars (\$5,000.00).
- C. The amount of the fine shall be set forth in the schedule of fines established by resolution of SSG and paid to SSG within thirty (30) days from the date of the administrative citation.
- D. If the fine is challenged by an administrative hearing as set forth in Section 1.085 and the hearing officer determines that the administrative citation shall be upheld, then the fine amount on deposit with SSG shall be retained by SSG.
- E. If after a hearing under Section 1.085, the hearing officer determines that the administrative citation should be upheld and the fine has not been deposited pursuant to an advance deposit hardship waiver, the fine shall be due within thirty (30) days of the date of the decision of the hearing officer is deposited in the mail. Failure to pay the fine within such period shall result in the suspension of the Driver permit of the Driver or Business, as may be applicable, until such time as payment is made.
- F. If after a hearing under Section 1.085 the hearing officer determines that the administrative citation should be canceled and the fine was deposited

with SSG, then SSG shall promptly refund the amount of the deposited fine, together with interest at the rate of five percent (5%) per annum for the period of time that the fine amount was held by SSG.

- G. Payment of a fine under this Chapter shall not excuse or discharge any continuation or repeated occurrence of the regulatory violation that is the subject of the administrative citation.

Section 1.205 Late Payment Charges

- A. Any person who fails to pay to SSG any fine or other payment imposed pursuant to the provisions of the ordinance of SSG on or before the date that fine or payment is due also shall be liable for the payment of any applicable late payment charges set forth in the schedule of fines. In addition, the permit of the Driver or Business involved may be suspended pending payment.

Section 1.210 Cost Recovery

- A. SSG may collect any past due administrative citation fine or late payment charge by use of all available legal means.
- B. SSG may collect any past due Business Permit Fees, Vehicle Permit Fees or any other fees established in this ordinance by use of all available legal means.
- C. SSG may recover its collection costs, including any reasonable attorneys' fees.

Section 1.215 Airports

- A. Nothing in this Chapter shall prevent Palm Springs Regional Airport or any other publicly owned airport from regulation of taxicab access or from charging access/permit fees.

ARTICLE II

OPERATING REQUIREMENTS

Section 2.010 Taxicab Businesses Distinct Appearance

- A. All Taxicabs operating under a Taxicab Business permit shall be of distinctive name and appearance such as is in common usage in this country for Taxicabs and shall have a standard monogram, insignia, or logo which is permanently affixed to each vehicle and clearly indicates that the vehicle is offered for the use of transportation of passengers for hire. Distinctive appearance may include the original factory paint color.
- B. No Taxicab Business permit shall be granted to any Person and/or company whose name, monogram, logo or insignia to be used on its Taxicabs is in conflict with, or imitates, any name, monogram, logo or insignia used by another Taxicab Business within the Jurisdictional Boundaries of SSG in such a manner as to be misleading to, or which would tend to deceive or defraud the public. This includes the consideration of a specific color referenced in the Taxicab Business' name.
- C. No Taxicab Business shall be entitled to utilize the name or telephone number of any previously operating Taxicab Business unless the assuming company has paid all fines, Business Permit Fees, Vehicle Permit Fees, and administrative penalties due to SSG from the previous Taxicab Business and otherwise complied with the requirements for issuance of a Taxicab Business permit under the ordinance of SSG. In any case where an administrative or other form of proceeding is pending against the previous Taxicab Business, no transfer of the name shall occur unless and until SSG is provided with adequate monetary assurance of payment of any anticipated monetary penalty. Assurance may be in the form of a bond or undertaking.

Section 2.015 Advertisements

- A. No Taxicab Business, Driver or any other person shall place or cause to be placed any advertisement which:
 - 1. Is misleading to, or would tend to deceive or defraud the public;
 - 2. Uses a name(s) other than the name(s) registered with SSG for which a valid taxicab business permit has been issued without first obtaining written consent of SSG; or
 - 3. Uses a name, monogram, logo or insignia which is in conflict with or imitates any monogram, logo or insignia used by any other person operating in the Jurisdiction Boundaries of SSG.

Section 2.020 Driver Standards and Appearance

- A. All drivers shall have in his or her immediate possession a valid California driver's license and a Driver permit issued by SSG while in charge of or driving a Taxicab and shall present either upon request.
- B. All Drivers shall be at least 18 years old.
- C. All Drivers shall have the ability to read signs, labels, work schedules, rate cards, information cards, maps and simple instructions in English, to understand and follow verbal directions in English, to write simple instructions in English and to speak English sufficiently to communicate clearly with the public at large.
- D. No Driver shall be afflicted with either a physical or mental incapacity or ailment that would preclude him or her from safely operating a Taxicab and performing the duties normal to such profession.
- E. All Drivers shall be well groomed and dressed in a neat and clean fashion at all times while on duty. At a minimum, attire shall include a collared shirt or blouse covering the shoulders, knee length shorts or skirt or long pants and closed toe shoes. T-shirts, spaghetti or strapless shirts, open toe shoes, flip flops, sweatpants and sandals are prohibited. A Driver shall wear an identification badge at all times while on duty. At a minimum, the shirt, blouse or identification badge worn by the Driver must bear the Driver's name and Business logo.
- F. All Drivers shall provide prompt, efficient service and be courteous at all times to the general public, the business community, all other Taxicab Drivers and SSG or local government administrators/officers. Disputes with the general public, the business community, other taxicab drivers and those in charge of taxicab stands on private property shall be resolved in a professional manner with a goal of maintaining a favorable public image for the taxicab industry.
- G. Smoking and the use of profanity is prohibited.
- H. No Driver shall refuse to transport wheelchairs, packages, luggage and animals as follows:
 - 1. Any passenger's wheelchair, which can be folded and placed in either the passenger vehicle or trunk compartment of the Taxicab;
 - 2. Groceries or packages when accompanied by a passenger;
 - 3. Personal luggage, possessions or small pets in appropriate carriers.

4. Any passenger's service animal or intentionally interfere with the use of service animal by harassing or obstructing the user of his or her service animal as defined by the Americans with Disabilities Act (ADA).
- I. All Drivers shall assist a passenger in and out of a Taxicab when requested, provided the driver is not required to lift the passenger.
- J. All Drivers shall assist a passenger by placing luggage, packages and wheelchairs in and out of the taxicab when requested.
- K. No Driver shall refuse a dispatch call or other request for Taxicab service to transport any passengers who present themselves in a sober and orderly manner and for a lawful purpose.
- L. All Drivers shall be adequately rested, and shall not operate a Taxicab for more than ten (10) consecutive hours, nor for more than ten (10) hours spread over a total of fifteen (15) consecutive hours. Thereafter, no Driver shall drive a Taxicab until eight consecutive hours have elapsed.
- M. All Drivers shall not engage in conduct or verbally threaten to engage in conduct which is dangerous or violent such that the safety of the traveling public, SSG employees or agents, taxicab drivers or other persons, is implicated.
- N. All Drivers shall not engage in argumentative or discourteous conduct toward the public, a passenger, other taxicab drivers or other persons while on call to provide taxicab service or in the course of providing such service.
- O. All Drivers shall not have been convicted of any of the crimes within the timeframes as set forth in Section 1.080 of this Chapter, whether committed in the State of California or elsewhere. A conviction within the meaning of this Section means a plea or verdict of guilty or a conviction following a plea of nolo contendere.
- P. In the event that a Driver is involved in a collision with another vehicle, a fixed object or a pedestrian, that results in injury and/or renders any vehicle inoperable, the Driver and/or the Permittee shall complete and submit to SSG a written SSG approved Collision/Injury Report within twenty four (24) hours of the incident.

Section 2.025 Special Events

- A. As a matter of public safety and efficiency, during certain designated events where there is expected to be heavy concentration of customers seeking taxicab service, no passenger appointments will be allowed for pick-ups

from the event. The designated events to which this regulation applies include:

1. The Coachella Valley Music and Arts Festival;
2. The Stagecoach Festival; and,
3. Any other event for which Permittees are provided written notice no less than thirty (30) days before the event.

Section 2.030 Taxi Administrator

- A. The Taxi Administrator or his/her designee may adopt, by ordinance, operating requirements for Taxicab Businesses and Taxicab Drivers that do not relate to permitting or business licensing pursuant to Government Code Section 53075.51.

Section 2.035 Fines and Penalties

- A. The minimum fine for violation of Article II of this Chapter shall be one hundred dollars (\$100.00).

RIV #4847-8426-5694 v2

SunLine Transit Agency

DATE: December 4, 2024 **DISCUSSION**

TO: Board Operations Committee

FROM: Edith Hernandez, Clerk of the Board/Director of Legislative Affairs

RE: Board Member Stipend Increase Update

Background

SunLine Transit Agency (SunLine) currently provides each member of the Board of Directors (Board) with a \$50 stipend for each Board meeting attended, and \$25 stipend for each committee meeting attended. At the May 22, 2024, Finance/Audit Committee and Board Operations Committee meetings, the Committees asked staff to conduct research on Board Member stipend practices to assess alignment with industry standards and identify potential adjustments. Staff determined the following:

- Peer transit agencies provide monthly stipends ranging from \$150 to \$200 per meeting with maximum monthly amounts ranging from \$300 to \$600.
- In 2017, SunLine's joint powers agreement (JPA) was amended to allow the Board to adopt a resolution providing for a stipend for attendance at Board meetings and subcommittee meetings up to a maximum of \$150 monthly pursuant to Government Code Section 36516(c).
- Any increase to the monthly meeting stipend may not take effect until at least one Board Member begins a new term or a new Board Member is appointed to the Board and serves a staggered term. (Government Code § 36516.5.)

The Board may consider the following policy options:

1. Do Nothing. The Board may choose not to increase the Board Member stipend.
2. Adopt a Resolution Increasing Compensation, Subject to the \$150 Cap. The Board may adopt a resolution increasing the stipend up to \$150 per month. For instance, the Board could increase compensation to \$75 for each Board meeting attended, and \$25 for each committee meeting attended, up to \$150 in aggregate.
3. Amend the JPA to Increase the Cap Beyond \$150. Under state law, SunLine may increase the monthly stipend from \$150 per month to \$1,275 per month. However, SunLine would need to amend its JPA to effect this change.

Performance Goal

Goal 3: Organizational Health & Resiliency – Ensure equitable compensation, fostering Board engagement, and implementing administrative best practices.

**SunLine Transit Agency
SunLine Services Group**

DATE: December 4, 2024 **DISCUSSION**

TO: Board of Directors

FROM: Mona Babauta, CEO/General Manager

RE: Receive Update on the Fiscal Year 2024-25 Goals, Strategic Objectives and Priorities and Provide Feedback

Recommendation

Recommend that the Board of Directors receive the mid-year update on the SunLine Transit Agency (SunLine) Fiscal Year (FY) 2024-25 Goals, Strategic Objectives and Priorities (FY 2024-25 Goals) and provide feedback as appropriate.

Background

The Board adopted SunLine's FY 2024-25 Goals document during the June 2024 Board meeting to: 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.

The CEO/General Manager and staff collaborated to develop the FY 2024-25 Goals document organizing it around 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.

This update represents staff's progress to-date in meeting the goals, strategic objectives and priorities defined in the FY 2024-25 Goals, which can be seen as bullets and highlighted text under each goal and/or objective in Attachment A to this report.

Financial Impact

No financial impact.

Attachment:

- [Item 16a](#) – FY 2024-25 SunLine Goals, Strategic Objectives and Priorities

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

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
<p>A</p> <p>Establish a formal training program for fleet maintenance staff</p>	<p>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.</p> <p>Progress Update:</p> <ul style="list-style-type: none"> 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.
<p>B</p> <p>Establish a zero emission training program for both technical and leadership staff</p>	<p>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.</p> <p>Progress Update:</p> <ul style="list-style-type: none"> 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. <p>ii. Continue to pursue workforce development funds to support staff investment.</p> <p>Progress Update:</p>

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

<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>	
STRATEGIC OBJECTIVES	PRIORITIES
	<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. <p>iii. Work with staff to identify training equipment and resources necessary for increasing training effectiveness onsite.</p> <p>Progress Update:</p> <ul style="list-style-type: none"> • 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.
<p>C</p> <p>Build the leadership capacity of the Executive Team</p>	<p>i. Coach and support staff on making strategic decisions independently.</p> <p>Progress Update:</p> <ul style="list-style-type: none"> • 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. <p>ii. Provide coaching by external consultants/formal executives to support leadership growth.</p>

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

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
	<p>Progress Update:</p> <ul style="list-style-type: none"> • 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. <p>iii. Utilize Insight Strategies to support strategic thinking efforts. – In progress. See Goal 1, subpart C.i above.</p> <p>iv. Point staff to industry training and networking opportunities. – In progress; training details may be found in the monthly GM Report in the Board Packets.</p>
<p>D Conduct organizational assessment(s) to identify areas for improvement and prioritize training investments</p>	<p>i. Continue work with Insight Strategies to survey employees to understand their professional needs.</p> <p>Progress Update:</p> <ul style="list-style-type: none"> • Insight Strategies has completed an employee survey, employee focus group discussions, and interviews with leadership. The CEO/GM and staff will be organizing town hall meetings with staff in various departments starting in December 2024 to report out on the survey results, which will be used to shape SunLine’s updated strategic plan. The strategic plan will then be used as a basis for the upcoming fiscal year budgets. <p>ii. Work with executive leaders and mid-managers on strategies and actions to implement organization-wide training programs.</p> <p>Progress Update:</p>

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

<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>	
STRATEGIC OBJECTIVES	PRIORITIES
	<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.
<p>E Create career ladders/pathways for staff to grow and improve competitiveness for promotions</p>	<ul style="list-style-type: none"> i. Continue training offerings through SunLine University. - Ongoing ii. Build training opportunities, as appropriate and as resources allow, into employee work plans. <p>Progress Update:</p> <ul style="list-style-type: none"> • 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. • Staff in the Board Clerk’s office is working on notary certification.

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

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
F Secure and expand technical capacity and expertise within the agency	<p>i. Continue to recruit and hire individuals with the necessary talent and expertise.</p> <p>Progress Update:</p> <ul style="list-style-type: none"> • Staff continues to thoughtfully hire individuals with the necessary skills to deliver projects and programs to maintain and enhance service delivery. • 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 adopted in July 2024) to ensure competitiveness in salaries and benefits to support talent recruitment and retention. <p>ii. Consider establishing and implementing a procedure to better evaluate and reward performance.</p> <p>Progress Update:</p> <ul style="list-style-type: none"> • Staff is updating the performance review process and assisting individuals with developing clear work plans with measurable action items.

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

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
<p>A</p> <p>Maximize system safety to include physical and operational security and overall resilience</p>	<p>i. Establish a strategic plan for better defining actions and priorities that maximize system and workplace safety.</p> <p>Progress Update: Staff is taking the updated Public Transportation Agency Safety Plan (PTASP) to the Board for approval in December 2024.</p> <p>ii. Ensure that executive management proactively engages employees and works to keep communication lines open.</p> <p>Progress Update:</p> <ul style="list-style-type: none"> • 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. <p>iii. Provide fuel type and bus familiarization training to local fire departments to improve response time for potential thermal events.</p> <p>Progress Update:</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.

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

		<p>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. In progress</p> <p>v. Develop training programs for staff that focus on de-escalation techniques and customer service skills. Progress Update:</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. <p>vi. Invest in new technology to protect patrons, transit agency personnel, and critical assets directly or indirectly at all times. Progress Update:</p> <ul style="list-style-type: none"> • 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.
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FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

		<p>vii. Reinforce mitigating actions taken to reduce the likelihood and severity of consequences to individuals and transit agency assets.</p> <p>Progress Update:</p> <ul style="list-style-type: none">• 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. <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>Progress Update:</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.
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FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

B	Deliver reliable service	<p>i. Create an effective, strategic fleet plan to ensure sufficient vehicles are available for daily pull-out.</p> <p>Progress Update:</p> <ul style="list-style-type: none"> • 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. <p>ii. Upgrade Scheduling Software (Trapeze) to increase staff planning and scheduling efficiencies.</p> <p>Progress Update: The Trapeze software upgrade from version 15 to 21 is in progress. Testing, training and implementation are scheduled to start in February 2025.</p> <p>iii. Implement performance monitoring processes to improve service planning efforts.</p> <p>Progress Update:</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
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FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

		<p>real time for safety and operational purposes, etc., was released in September 2024. Proposals should be received soon.</p> <p>iv. Implement and/or better publicize customer information tools that communicate service availability/status to minimize wait and travel times.</p> <p>Progress Update:</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.
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> <p>Progress Update:</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. 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. <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>Progress Update:</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

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

		<p>the Board in January 2025. Potential transition to a new vendor would occur in April 2025.</p> <p>iii. Identify and explore transit models that complement SunLine’s fixed route system and improve mobility in low density communities.</p> <p>Progress Update: This will be included as part of the COA process, as well as the microtransit (SunRide) solicitation process.</p>
D	Design, plan and implement capital investments that support operating needs	<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>Progress Update:</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. <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>Progress Update:</p> <ul style="list-style-type: none"> • Agency priorities have been identified and work has begun on large projects. <ul style="list-style-type: none"> ○ 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.

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

		<ul style="list-style-type: none"> ○ 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.
E	Coordinate with regional transportation planning/funding agencies and service providers to maximize seamlessness of travel for local citizens and visitors	<ul style="list-style-type: none"> 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. Progress Update: <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. ii. Participate in Coachella Valley Rail (CV Rail) station area planning efforts as appropriate for maximizing potential, future synergies between rail and bus transit. Progress Update: <ul style="list-style-type: none"> ● Staff are participating in station area planning meetings in Indio and Coachella.
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).		
STRATEGIC OBJECTIVES		PRIORITIES
A	Conduct regular long-range financial planning exercises	<ul style="list-style-type: none"> 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.

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

		<p>Progress Update: 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.</p> <p>ii. Develop an annual budget that aligns with long-term budget projections and known funding resources.</p> <p>Progress Update:</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. <p>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.)</p> <p>Ongoing</p> <p>iv. Improve SunLine's Key Performance Indicator (KPI) program to provide a suite of KPIs that aid in long range planning rooted in data.</p> <p>Progress Update: 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.</p>
B	Regularly review the reserve policy and grow reserves responsibly	<p>i. Continue to allocate a sufficient amount to the SunLine reserve to meet critical needs in the future. Ongoing</p>

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

C	<p>Establish a fare structure that allows SunLine to improve and expand service</p>	<p>i. Conduct a fare payment study and cost recovery analysis. Progress Update: This will be included in the COA.</p> <p>ii. Take measured steps to amend the fare structure as necessary for the Agency’s long term sustainability. Ongoing and will be considered as part of an upcoming Short Range Transit Planning process.</p>
D	<p>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. Ongoing</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. Progress Update:</p> <ul style="list-style-type: none"> • 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. <p>iii. Research and pursue competitive grant opportunities and/or earmarks for meeting capital investment, workforce development, safety/security, and service enhancement initiatives. Progress Update:</p>

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		<ul style="list-style-type: none"> • In October, 2024, TIRCP awarded a grant of \$612,000 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. <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>Progress Update:</p> <ul style="list-style-type: none"> • SunLine created a Director of 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 during regular meetings. • Staff conducted an advocacy trip to Sacramento in August 2024. • Staff is presenting a draft Legislative Program to the Board for discussion in December 2024.
E	<p>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>Progress Update:</p> <ul style="list-style-type: none"> • 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.

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

		<ul style="list-style-type: none"> • 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. <p>ii. Secure necessary expertise for maintaining SunLine’s IT and IS foundation.</p> <p>Progress Update: SunLine hired Helixstorm to improve SunLine’s IT system functions and reliability.</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>Progress Update: Staff is currently exploring and planning the implementation of cloud based systems. Disaster recovery processes are also being prioritized.</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>Progress Update:</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. <p>v. Complete outsource of payroll processing to ADP.</p> <p>Progress Update: 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.</p>
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FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

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	<p>i. Continue public outreach efforts to gather public feedback on mobility needs. Ongoing: Staff continues to actively reach out to established community organizations to schedule presentations and feedback forums.</p> <p>ii. Conduct outreach to local city officials for feedback on local needs. Progress Update:</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. <p>iii. Conduct ridership surveys. Progress Update:</p> <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. <p>iv. Complete On Board Ridership Survey Study. (Previous survey completed in 2019.) Progress Update:</p>

FY 2024-25 SunLine Goals, Strategic Objectives & Priorities

		<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. <p>v. Establish Rider Advocacy/Advisory Committee(s) as appropriate for better understanding ridership needs.</p> <p>Progress Update:</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.
B	Communicate on SunLine’s organizational health and sustainability	<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>Progress Update:</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.
C	Reevaluate SunLine’s brand strategies	<p>i. Engage local cities on bus stop investments, public signage and customer amenities to improve public perception and system appeal.</p> <p>Progress Update:</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

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		<p>enhance system safety/security, improve system appeal, and improve public perception of SunLine service as a safe mode of transportation. Staff is exploring new, more appealing street furniture options that could improve rider comfort and complement better the local, desert aesthetic.</p> <p>ii. Freshen fleet appearance.</p> <p>Progress Update:</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.
D	Strengthen SunLine’s community presence.	<p>i. Complete website update.</p> <p>Progress Update:</p> <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. <p>ii. Improve social media presence and response time to public feedback.</p> <p>Ongoing.</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>Progress Update:</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.

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		<p>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.</p> <ul style="list-style-type: none"> • 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.
<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>STRATEGIC OBJECTIVES</p>		<p>PRIORITIES</p>
<p>A</p>	<p>Grow the alternative fuels program responsibly</p>	<p>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.</p> <p>Progress Update:</p> <ul style="list-style-type: none"> • 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.

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		<p>ii. Update the Zero Emission Bus (ZEB) Transition Plan. Ongoing.</p> <p>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. Ongoing.</p> <p>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.</p>
B	<p>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. Progress Update:</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. • Meeting have been held with firms looking to locate near geothermal and wind energy sources that would like to supply SunLine with hydrogen. Work has also been done to increase the renewable content of the hydrogen we use to fuel our buses and supply to the public. 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. <p>ii. Consider pursuing a sustainability study of SunLine’s facilities and implementing a Sustainable Facilities Management Program, as resources allow. Ongoing: SunLine’s FY 2024 federal RAISE grant application was automatically resubmitted by Federal DOT staff to complete a sustainability study/facilities</p>

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		<p>management plan, given its high rating in the last evaluation process. A final decision is expected by summer 2025.</p>
C	<p>Obtain staff buy-in and understanding of SunLine’s commitment to sustainability</p>	<ul style="list-style-type: none"> <li data-bbox="814 363 1976 683"> <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>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.</p> <li data-bbox="814 704 1976 943"> <p>ii. Increase internal communication on staff efforts to balance investments in leading edge technology with efforts to ensure service reliability.</p> <p>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.</p> <li data-bbox="814 964 1976 1089"> <p>iii. Leverage the Wellness Committee to promote a healthy workforce and efforts to reduce our carbon footprint.</p> <p>Ongoing.</p>

SunLine Transit Agency

DATE: December 4, 2024 **INFORMATION**

TO: Board of Directors

FROM: Edith Hernandez, Clerk of the Board/Director of Legislative Affairs

RE: Legislative Update for December 2024

Background

The November election has concluded, solidifying leadership at both state and federal levels. A proposed legislative program was discussed with the Finance/Audit Committee and Board Operations Committee, with an action item planned for the new year.

State

Following this year's election, California retained its current Statewide officers, and there were no transit-related initiatives on the ballot. Californians approved Proposition 4, a \$10 billion climate bond to address climate change impacts such as wildfires, drought, and extreme heat, with at least 40% of funds designated for disadvantaged communities. The 2025-26 Legislative Session convened on Monday, December 2, 2024. Additionally, Governor Newsom called a Special Session of the Legislature in response to President-Elect Trump.

SunLine will collaborate with its State Delegation, including Senators Rosilicie Ochoa Bogh (SD-19) and Steve Padilla (SD-18). In the Assembly, we will work with Assemblymember-Elect Jeff Gonzalez (AD-36) and Assemblymember Greg Wallis (AD-47) to advance the Agency's budgetary and policy priorities for the upcoming session.

Federal

At the federal level, the incoming administration under President-Elect Trump is taking shape, with the nomination of former Congressman Sean Duffy (R-WI) as Secretary of Transportation. The U.S. House of Representatives will maintain a narrow Republican majority, led by Speaker Mike Johnson (R-LA).

In our region, both Congressman Raul Ruiz (CA-25) and Congressman Ken Calvert (CA-41) secured re-election. We look forward to continuing collaboration with them on federal transit initiatives.

Californians elected Congressman Adam Schiff (CA-30) to complete the remainder of Senator Feinstein's term and to serve a full six-year term. He joins Senator Alex Padilla

in representing the state, though both will be part of the Senate minority as Republicans hold a slight majority. Senator John Thune (R-SD) will serve as the Majority Leader.

Congress is currently negotiating a short-term Continuing Resolution (CR) to fund the government into 2025, with the current CR set to expire on December 20, 2024. The 119th Congress will convene on January 3, 2025, overlapping with the final days of President Biden's term.

SunLine Transit Agency

DATE: December 4, 2024 **INFORMATION**

TO: Board of Directors

FROM: Mona Babauta, CEO/General Manager

RE: General Manager's Report for December 2024

Safety Update

Transportation Safety Institute (TSI) Bus System Safety Training – Los Angeles, CA (October 20-25, 2024)

SunLine's Risk Manager, John Sowers, attended the Transportation Safety Institute (TSI) Bus System Safety Course in Los Angeles, CA from October 20 to October 25, 2024. This course is beneficial for SunLine as it provides comprehensive training on the four pillars of Safety Management Systems (SMS) and how SMS and System Safety work together to create a safer working environment. The course covers the application of engineering and management principles, criteria, and techniques to lower safety risks to acceptable levels.

Attending this course is important for several reasons:

1. *Enhanced Safety Knowledge:* Staff gain in-depth knowledge of safety management systems and best practices in bus system safety, which is essential for maintaining and improving safety standards within our organization.
2. *Risk Reduction:* The training helps staff understand how to identify, assess, and mitigate safety risks, leading to a safer transit environment for both employees and passengers.
3. *Regulatory Compliance:* The course ensures that SunLine's safety practices are in line with federal regulations and industry standards, helping us stay compliant with safety requirements.
4. *Professional Development:* Participation in this course supports the professional growth of SunLine's safety staff, equipping them with the latest tools and techniques in transit safety management.

Overall, the TSI Bus System Safety Course is a valuable investment in the safety and efficiency of SunLine's transit operations, ensuring that staff is well-prepared to handle safety challenges and contribute to a safer transit system.

DMV Examiner Program Course – Sacramento, CA (October 30 - November 1, 2024)

SunLine's Senior Training Supervisor, Asael Reyes, attended the DMV Examiner Program Course in Sacramento, CA from October 30 to November 1, 2024 to become a certified examiner and conduct in-house behind-the-wheel testing for the Agency. This training is crucial for several reasons:

1. *Enhanced Testing Capabilities:* By becoming a certified examiner, staff can conduct in-house behind-the-wheel testing, which streamlines the process and reduces the need for external testing services.
2. *Improved Efficiency:* In-house testing allows for better scheduling flexibility and quicker turnaround times for new drivers, ensuring that transit operations run smoothly and efficiently.
3. *Cost Savings:* Conducting tests internally can lead to significant cost savings by reducing fees associated with external testing and minimizing downtime for drivers awaiting certification.
4. *Quality Control:* Having SunLine's own certified examiner ensures that testing standards are consistently maintained, leading to higher quality and more reliable driver assessments.
5. *Regulatory Compliance:* The training ensures that staff is fully knowledgeable about DMV regulations and testing procedures, helping SunLine stay compliant with state requirements.

Overall, attending the DMV Examiner Program Course is a valuable investment in staff's capabilities and the efficiency of SunLine's transit operations.

Operations Update

Cal Fire Cooling Bus – Coachella, CA (October 12, 2024)

On Saturday, October 12, 2024, Cal Fire provided a cooling bus for President-elect Donald Trump's rally at Calhoun Ranch in Coachella, CA. The bus was stationed at the event from 9:00 a.m. to 10:00 p.m. to offer relief from the heat.

Reasonable Suspicion Training/Trick or Transit - (October 31, 2024)

On Thursday, October 31, 2024, Transportation staff attended Reasonable Suspicion Training. This training provided valuable benefits, including enhancing staff's ability to identify signs of impairment in employees, ensuring a safer workplace, and helping to maintain compliance with regulations regarding workplace safety and conduct. The training also improved the staff's response to potential situations involving substance use, fostering a safer and more responsible work environment.

Also on October 31, 2024, the Transportation Department hosted "Trick or Transit," a Halloween-themed event for operators, which was combined with the monthly birthday

celebrations. The event offered a fun and festive atmosphere, strengthening team morale and providing an opportunity for staff to celebrate together.

Administrative and Planning Update

Meeting with City of Palm Desert

The Planning staff met with the City of Palm Desert to discuss plans and efforts related to the Palm Desert General Plan update. This meeting focused on the Circulation section of the plan. Discussion focused on efforts where the two entities can work together on a shared transportation vision for the community.

Transit and Intercity Rail Capital Program (TIRCP) Grant Award - (November 7, 2024)

SunLine received notification of a \$612,000 grant award to launch a contactless Open Loop fare payment system in partnership with Cal-ITP. Open Loop fare payment systems allow riders to pay with a debit card, a credit card, ApplePay, or Google Pay. Open Loop fare payment systems further expand the methods a rider can pay for a bus trip, further reducing payment barriers.

Community/Industry Engagement Events

Family Resource & Program Engagement – Indio, CA (October 17, 2024)

Marketing team members attended this community outreach event hosted by the Riverside County Office Education School of Career Education in Indio, CA, on October 17, 2024. The event was geared towards students and their families to receive free flu shots along with information regarding community services and resources available from many different vendors. Staff spoke to over 25 families about SunLine's services.

Golf Cart Parade –Palm Desert, CA (October 27, 2024)

On October 27, 2024, the SunLine team had a bus available at the Kids Zone of the Palm Desert Golf Cart Parade. The bus was available for kids and their families to go in and see a Hydrogen Fuel Cell bus. Staff also set out a cornhole game for visitors to enjoy, and staff answered questions from the community and visitors to the Coachella Valley. We had a total of 320 interactions.

This year, staff also participated in the parade with a float that stood out in both creativity and craftsmanship. The float, a golf cart skillfully retrofitted into a miniature SunLine bus (FC .5), has a remarkable history. Originally built by two talented SunLine mechanics, it was brought to life again through the expertise of Steve Kelso, who had collaborated with his father on the initial design. Steve's exceptional work, combined with the imaginative decorations crafted by our dedicated staff, resulted in a stunning entry. SunLine's float was awarded Best Overall Design among over 100 participants.

SunLine's Haunted Bus – Palm Springs, CA (October 31, 2024)

On October 31, 2024, SunLine brought Halloween excitement to the Palm Springs Village Festival with its highly anticipated Haunted Bus. This year's theme, inspired by Beetlejuice, showcased the creativity and teamwork of staff from all departments, who collaborated to transform the bus into a thrilling and memorable experience.

The event was a success, attracting over 1,000 trick-or-treaters and their families, who eagerly ventured through our Spooktacular creation. SunLine was proud to deliver a night of festive fun and community engagement.

American Heart Association, Coachella Valley Heart and Stroke Walk – Palm Desert, CA (November 9, 2024)

On November 9, 2024, SunLine staff proudly participated in the American Heart Association's Coachella Valley Heart and Stroke Walk at the Palm Desert Civic Center Park. Participation spanned across the agency, with teams forming months in advance to compete for the highest step count in a friendly competition aimed at promoting healthy habits.

At the event, SunLine showcased its Hydrogen Fuel Cell bus featuring a specially designed wrap created in partnership with the American Heart Association. This bilingual wrap, in both English and Spanish, raises awareness of stroke warning signs and underscores the importance of community health education.

Additionally, SunLine hosted an informational booth, engaging with approximately 150 community members and further supporting the event's mission of promoting heart and stroke health awareness.

Making Connections 2024 – National Transit Workforce Conference – Baltimore, MD (November 11-13, 2024)

Staff from the Safety, Operations, and Human Resources departments attended the Making Connections 2024 – National Transit Workforce Conference in Baltimore, Maryland, from November 11 to November 13, 2024. The conference focused on several main themes, including strategies for recruitment and retention, innovative training programs and apprenticeships for upskilling transit workers, the integration of new technologies to improve operations and workforce efficiency, and initiatives to advance diversity, equity, and inclusion within the transit workforce. Attendees participated in interactive sessions and workshops on topics such as best practices for recruiting frontline transit workers, successful workforce development programs, and the integration of technological advancements into transit systems. One of the more valuable aspects of this training opportunity was face time with union leaders, allowing staff to collaborate on areas of mutual interest such as workforce development and apprenticeships.

California Public Employers Labor Relations Associations (CALPELRA) Annual Conference – Monterey, CA (November 12-15, 2024)

SunLine's Chief of Human Relations Officer, Tamara Miles, and Chief Transportation Officer, Isabel Vizcarra, participated in the Annual CALPELRA Conference in Monterey, CA, from November 12 to November 15, 2024. During the conference, they attended valuable sessions focused on labor relations, human resources, and employment training. These sessions offered valuable strategies for enhancing workforce management and development within the transportation industry.

Global Mass Transit – Transit Ticketing and Fare Collection in the U.S. – San Francisco, CA (November 13-14, 2024)

Staff from the Planning department attended the Global Mass Transit – Transit Ticketing and Fare Collection in the U.S. Conference in San Francisco, CA, from November 13 to November 14, 2024. Staff learned from industry leaders on best practices for the deployment of fare payment systems. This conference brought together leading transit agencies and operators, state/local governments, system integrators, technology and service provider firms, smartcard companies, technology and equipment manufacturers, mobile ticketing vendors, credit card companies, data architecture and IT firms, fare collection system suppliers, dynamic multiservice journey planners, taxi fleet operators, ride-hailing and ride-sharing service providers, micro-mobility providers, ticketing infrastructure providers, industry consultants, research and development organizations, financiers, technical institutes, etc.

The 20th Annual Greater Palm Springs Economic Summit – Rancho Mirage, CA (November 19, 2024)

Staff from various departments attended the Coachella Valley Economic Partnership's (CVEP) Annual Greater Palm Springs Economic Summit in Rancho Mirage, CA, on November 19, 2024. The event provided valuable insights into demographics and economic trends across the Coachella Valley, fostering opportunities for collaboration, innovation, and growth.

California Transit Association's (CTA) 59th Annual Fall Conference & Expo – San Jose, CA (November 20-22, 2024)

Staff from various departments attended CTA's Annual Fall Conference & Expo in San Jose, CA, from November 20 to November 22, 2024. They participated in sessions covering a wide range of topics, including Policy, Innovation, and Customer Experience, Maintenance, Management and Leadership, Operations, Labor Relations and Negotiations, and more. The valuable insights gained at the conference will be applied within their respective departments to support and enhance SunLine's operations and objectives.

Fill the Bus – Palm Desert, CA & Palm Springs, CA (November 21 and 22, 2024)

On November 21, 2024, SunLine staff from all departments came together to support two vital organizations in the Coachella Valley: the Coachella Valley Rescue Mission (CVRM) and Food Now. Donation efforts were staged at two locations, with one bus positioned at the Walmart on Monterey in Palm Desert and another at Ralphs in Smoke Tree Village, Palm Springs.

Between 7:00 a.m. and 7:00 p.m., the community demonstrated remarkable generosity, enabling SunLine to collect 7.37 tons of food and household items, along with 434 turkeys and hams.

The following day, the non-perishable goods were delivered to CVRM and Food Now, whose gratitude was evident as these donations will provide countless families with a hearty Thanksgiving meal. This collective effort highlights the power of community in making a meaningful difference during the holiday season.

Cathedral City Hot Air Balloon Festival – November 23, 2024

The Marketing and Taxi teams represented SunLine at the Touch-a-Truck exhibit during the Cathedral City Hot Air Balloon Festival. A highlight of our display was one of SunLine's newest Hydrogen Fuel Cell buses, which provided children and their families the opportunity to step aboard, take a seat, and experience the interior of a local fixed-route bus firsthand.

SunLine's team engaged with over 100 attendees, answering questions about SunLine's services and addressing inquiries about the innovative technology behind hydrogen-powered public transportation. Many visitors to the area expressed enthusiasm and curiosity, highlighting the growing interest in sustainable transit solutions.

9th Annual Student Art Contest – Thousand Palms, CA (November 25, 2024)

On November 25, 2024, SunLine proudly celebrated the unveiling event for this year's Student Art Contest. As in previous years, SunLine received exceptional artwork submissions from students representing over 10 schools across the Coachella Valley.

We extend our heartfelt gratitude to our generous sponsors — Inland Empire Health Plan, the City of La Quinta, and the City of Palm Desert — whose ongoing support makes it possible to feature student artwork on three bus wraps annually.

This year's contest recognized a winner in each category, with their artwork showcased on a hydrogen fuel cell bus. Additionally, the impressive creations of the seven finalists will be displayed at bus stops near their respective schools, celebrating their talent and creativity while enriching our community spaces.

2024 Student Art Contest Winners
(Bus Wrap Art)

Elementary School Finalists

- Dya Valentina Flores Arambula
5th grade, Mountain Vista Elementary
- Lizette Valenzuela
2nd grade, Cielo Vista Charter School

Middle School Finalists

- Isabella Machado Gonzalez
6th grade, La Quinta Middle School
- Farah Reagan
7th grade, La Quinta Middle School
- LJ Larsen
7th grade, Palm Desert Charter Middle School

High School Finalists

- Chanhwee Park
9th grade, Palm Desert High School
- Noemy Vazquez
12th grade, Desert Hot Springs High School

2024 Student Art Contest Finalists
(Bus Shelter Art)

Elementary School 1st Place Winner

- Antonio Coloma II
4th grade, Benjamin Franklin Elementary

Middle School 1st Place Winner

- Gabrielle Lou Mercedeine Coloma
7th grade, La Quinta Middle School

High School 1st Place Winner

- Lily Jones
12th grade, Palm Valley School