



SunLine Transit Agency/  
 SunLine Services Group  
 March 26, 2025  
 12:00 p.m.

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

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

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**NOTICE TO THE PUBLIC**

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

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

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

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**ITEM**

**RECOMMENDATION**

**1. CALL TO ORDER**

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

**2. FLAG SALUTE**

**ITEM**

**RECOMMENDATION**

3. ROLL CALL

4. FINALIZATION OF AGENDA

5. PUBLIC COMMENTS

RECEIVE COMMENTS

**NON AGENDA ITEMS**

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

6. PRESENTATIONS

7. BOARD MEMBER COMMENTS

RECEIVE COMMENTS

8. CONSENT CALENDAR

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

**APPROVE**

- |   |              |
|---|--------------|
| 8a) Acceptance of Checks \$1,000 and Over Report for January 2025                 | (PAGE 8-12)  |
| 8b) Acceptance of Credit Card Statement for January 2025                          | (PAGE 13-23) |
| 8c) Acceptance of Monthly Budget Variance Report for January 2025                 | (PAGE 24-28) |
| 8d) Acceptance of Contracts Signed in Excess of \$25,000 Report for January 2025  | (PAGE 29-30) |
| 8e) Acceptance of Union & Non-Union Pension Investment Asset Summary January 2025 | (PAGE 31-42) |
| 8f) Acceptance of Ridership Report for January 2025                               | (PAGE 43-46) |
| 8g) Acceptance of SunDial Operational Notes for January 2025                      | (PAGE 47-49) |
| 8h) Acceptance of Metrics for January 2025  | (PAGE 50-73) |
| 8i) Acceptance of Quarterly Performance Summary for Q4 of Calendar Year 2024      | (PAGE 74-78) |
| 8j) Acceptance of Board Member Attendance Report for February 2025                | (PAGE 79-80) |



<u>ITEM</u>	<u>RECOMMENDATION</u>
8k) Approval of Joint Board Meeting Minutes for February 26, 2025	(PAGE 81-85)
8l) Acceptance of SSG/SRA Checks \$1,000 and Over Report for January 2025	(PAGE 86-87)
8m) Acceptance of SSG Monthly Budget Variance Report for January 2025	(PAGE 88-90)
8n) Acceptance of Taxi Trip Data Report – January 2025	(PAGE 91-92)
<b>9. APPROVAL OF PENSION INVESTMENT MANAGEMENT SERVICES CONTRACT</b> (Lynn Mallotto, Chair of Finance/Audit Committee; Staff: Luis Garcia, Chief Financial Officer)	<b>APPROVE</b> (PAGE 93-96)
<b>10. AWARD OF CONTRACT FOR ARCHITECTURAL &amp; ENGINEERING SERVICES RELATED TO WORKFORCE TRAINING CENTER</b> (Lynn Mallotto, Chair of Finance/Audit Committee; Staff: Walter Watcher, Chief of Capital Projects)	<b>APPROVE</b> (PAGE 97-100)
<b>11. AWARD AGREEMENT TO INSIGHT STRATEGIES FOR PERFORMANCE MANAGEMENT RENOVATION, CRISIS AWARENESS AND DE-ESCALATION TRAINING AND EXECUTIVE COACHING SERVICES</b> (Lynn Mallotto, Chair of Finance/Audit Committee; Staff: Greg Wildman, Chief of Strategic Alignment)	<b>APPROVE</b> (PAGE 101-103)
<b>12. FIRST READING OF SUNLINE SERVICES GROUP (SSG) ORDINANCE NO. 2025-02, TAXICAB SERVICE ORDINANCE</b> (Glenn Miller, Chair of Taxi Committee; Staff: Jill Plaza, Taxi/Contracted Transportation Services Administrator)	<b>APPROVE</b> (PAGE 104-172)
<b>13. APPROVE 2025 STATE AND FEDERAL LEGISLATIVE PROGRAM</b> (Staff: Edith Hernandez, Director of Board and Legislative Affairs)	<b>APPROVE</b> (PAGE 173-181)
<b>14. DRAFT VISION AND MISSION STATEMENT AND STRATEGIC PLAN</b> (Staff: Greg Wildman, Chief of Strategic Alignment)	<b>DISCUSSION</b> (PAGE 182-224)
<b>15. LEGISLATIVE UPDATE FOR MARCH 2025</b> (Staff: Edith Hernandez, Director of Board and Legislative Affairs)	<b>INFORMATION</b> (PAGE 225-229)

**ITEM**

**RECOMMENDATION**

**16. CEO/GENERAL MANAGER'S REPORT**

**17. CLOSED SESSION**

**a) CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION (Cal. Govt. Code Section 54956.9(d)(1))**

Riverside County Superior Court, Case No. CVPS2301607

Riverside County Superior Court, Case No. CVPS2301610

**b) PUBLIC EMPLOYEE PERFORMANCE EVALUATION**

Pursuant to Government Code section 54957(b)

Position: Chief Executive Officer/General Manager

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

**19. NEXT MEETING DATE**

April 23, 2025 at 12 p.m.

Board Room

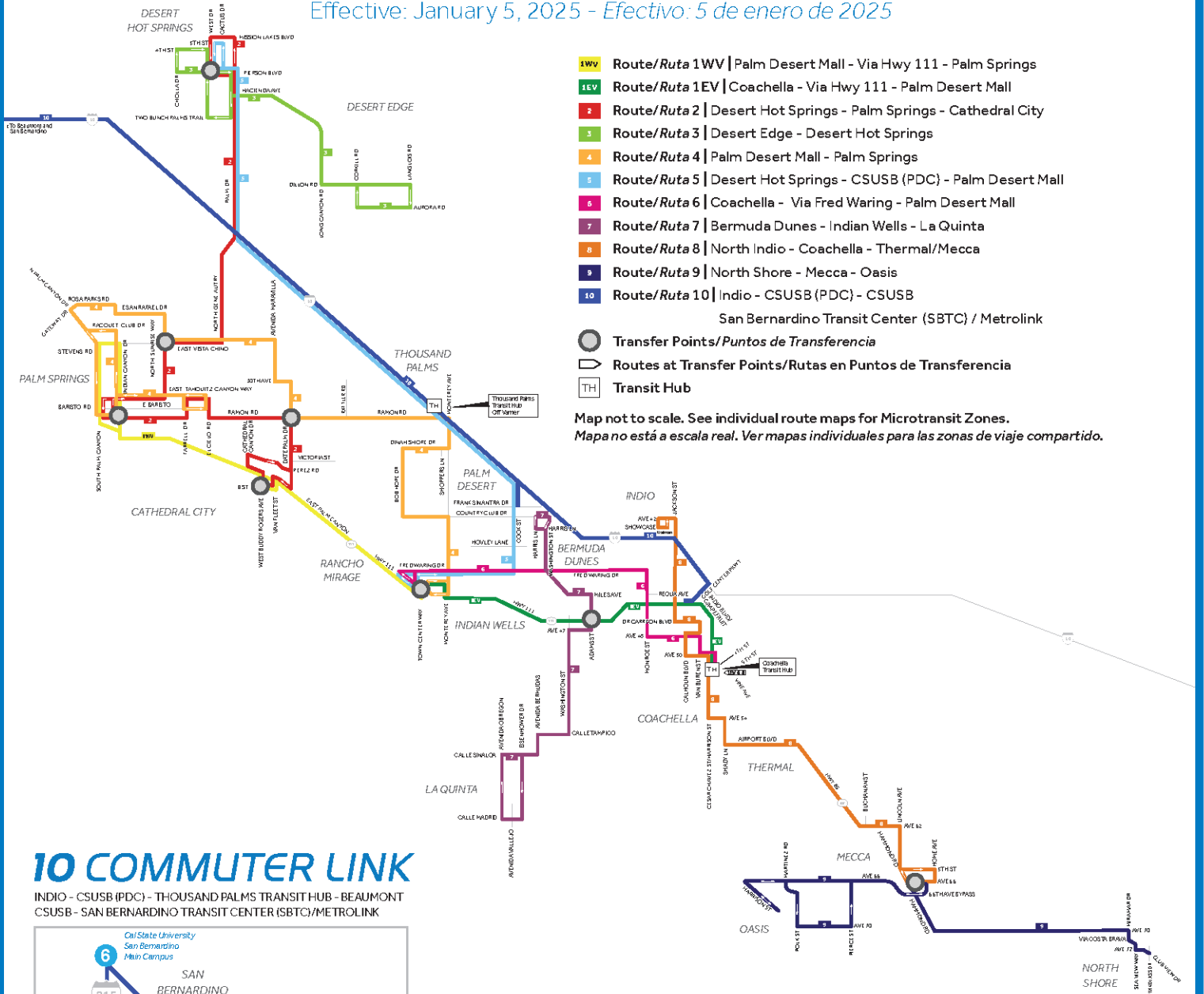
32-505 Harry Oliver Trail

Thousand Palms, CA 92276

**20. ADJOURN**

# SYSTEM MAP - MAPA DEL SISTEMA

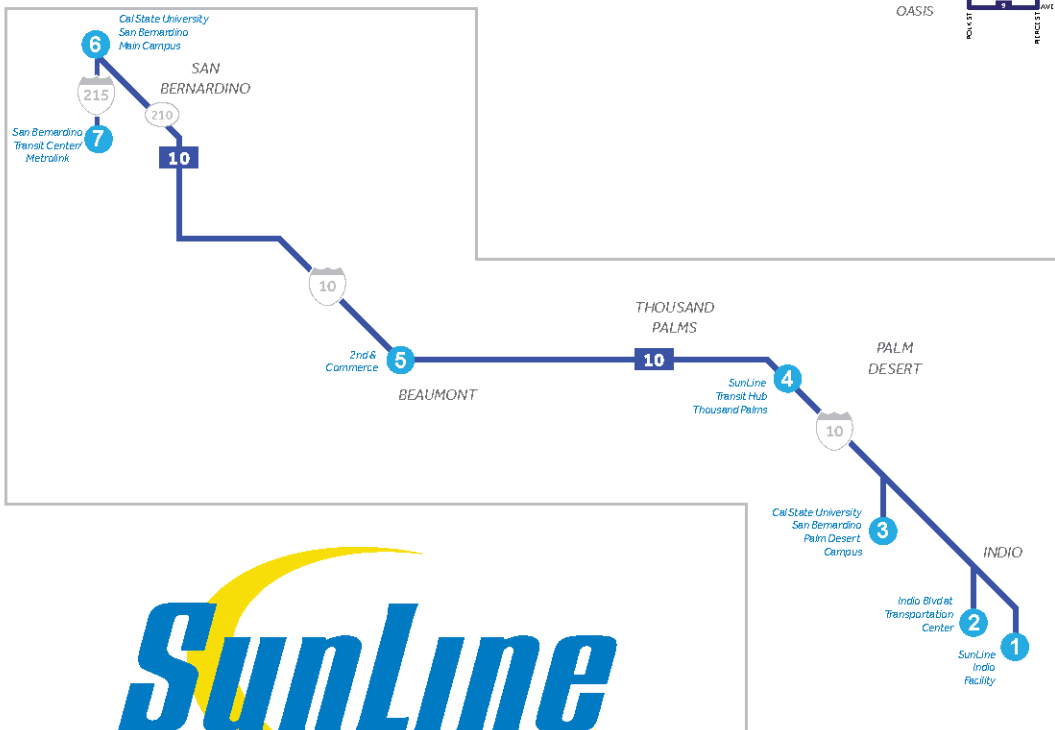
Effective: January 5, 2025 - Efectivo: 5 de enero de 2025



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



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**SunLine Transit Agency**

**ACRONYMS LIST OF TRANSPORTATION TERMS**

Last Updated: 02/18/2025

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

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

**SunLine Transit Agency**

**CONSENT CALENDAR**

DATE: March 26, 2025

**APPROVE**

TO: Finance/Audit Committee  
Board of Directors

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

Summary:

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

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

<b>Vendor</b>	<b>Check #</b>	<b>Amount</b>
<i>Clever Devices LTD.</i>	<i>698563</i>	<i>\$434,392.00</i>
<i>New Flyer of America Inc.</i>	<i>698600</i>	<i>\$324,436.16</i>
<i>Connected Solutions Group, LLC</i>	<i>698566</i>	<i>\$236,930.68</i>
<i>Clever Devices LTD.</i>	<i>698480</i>	<i>\$217,195.00</i>
<i>Carahsoft Technology Corporation</i>	<i>698557</i>	<i>\$206,082.10</i>

Recommendation:

Approve.

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

<b>Vendor Filed As Name</b>	<b>Description</b>	<b>Check #</b>	<b>Payment Date</b>	<b>Payment Amount</b>
CALPERS	Group Health Premiums	698555	01/22/2025	456,515.46
CLEVER DEVICES LTD.	WIP-Radio System Replacement-Project Acct#1905-02	698563	01/22/2025	434,392.00
NEW FLYER OF AMERICA INC.	WIP-Hydrogen Fuel Cell Buses - Project Acct#2401-01	698600	01/22/2025	324,436.16
CONNECTED SOLUTIONS GROUP, LLC	WIP-Information Technology- Project Acct#2002-03	698566	01/22/2025	236,930.68
CLEVER DEVICES LTD.	WIP-Radio System Replacement-Project Acct#1905-02	698480	01/15/2025	217,195.00
CARAHSOFT TECHNOLOGY CORPORATION	Computer/Network Software Agreement	698557	01/22/2025	206,082.10
U.S. BANK INSTITUTIONAL TRUST-WESTERN	Pension Deposit	698628	01/22/2025	85,161.61
U.S. BANK INSTITUTIONAL TRUST-WESTERN	Pension Deposit	698453	01/08/2025	85,126.13
SO CAL GAS CO.	Utilities	698526	01/15/2025	64,902.49
ANEW RNG, LLC	Utilities	698550	01/22/2025	64,013.08
IMPERIAL IRRIGATION DIST	Utilities	698591	01/22/2025	53,965.12
ATKINSON, ANDELSON, LOYA RUUD AND ROMO	Legal Service	698466	01/15/2025	48,117.24
HANSON BRIDGETT LLP	Legal Service	698497	01/15/2025	39,313.00
HANSON BRIDGETT LLP	Legal Service	698403	01/08/2025	35,378.00
CALIFORNIA DEPARTMENT OF TAX & FEE	Annual Use Fuel Tax for 2024	698641	01/27/2025	26,902.00
GILLIG LLC	Inventory Repair Parts	698587	01/22/2025	24,399.17
HELIXSTORM	Contracted Services	698498	01/15/2025	23,470.10
YELLOW CAB OF THE DESERT	SunRide Ride Share Expenses	698638	01/22/2025	18,722.66
YELLOW CAB OF THE DESERT	SunRide Ride Share Expenses	698458	01/08/2025	18,513.58
YELLOW CAB OF THE DESERT	SunRide Ride Share Expenses	698541	01/15/2025	14,707.04
VERIZON WIRELESS	Wireless Telephone Service	698535	01/15/2025	13,781.44
TRUGUARD SECURITY SERVICES, INC	Security Guard Services	698452	01/08/2025	11,931.48
CALIFORNIA DEPARTMENT OF TAX & FEE	Annual Exempt Bus Operator Use Fuel Tax for 2024	698642	01/27/2025	11,704.00
INSIGHT STRATEGIES INC	Consulting	698407	01/08/2025	11,700.00
PACIFIC LIFT AND EQUIPMENT INC	WIP-Facility Improvement Project-Project Acct#2115-06	698430	01/08/2025	11,526.41
PALM SPRINGS MOTORS, INC.	Inventory Repair Parts	698603	01/22/2025	11,137.84
INTEGRATED CRYOGENIC SOLUTIONS LLC	Contract Services	698501	01/15/2025	10,773.89
NFI PARTS	Inventory Repair Parts	698459	01/15/2025	10,730.30
SHUTTLE BUS LEASING	Outside Repair-Fixed Route	698624	01/22/2025	10,000.00
DYNAMIC BUILDING MAINTENANCE INC	Janitorial Services	698397	01/08/2025	9,349.00
FRANKLIN TRUCK PARTS, INC	Inventory Repair Parts	698582	01/22/2025	9,262.73
DOVE PRINTING	Printing Expense	698418	01/08/2025	8,907.15
TEC EQUIPMENT, INC.	Inventory Repair Parts	698530	01/15/2025	8,876.09
PAUL ASSOCIATES	Printing Expense	698607	01/22/2025	8,299.62
NFI PARTS	Inventory Repair Parts	698545	01/22/2025	8,158.43
NFI PARTS	Inventory Repair Parts	698375	01/08/2025	8,025.54
RUSH TRUCK CENTERS OF CALIFORNIA, INC.	Inventory Repair Parts	698621	01/22/2025	7,595.12
JE STRATEGIES LLC	Consulting	698510	01/15/2025	7,500.00
NAPA AUTO PARTS	Inventory Repair Parts	698512	01/15/2025	6,764.30



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

<b>Vendor Filed As Name</b>	<b>Description</b>	<b>Check #</b>	<b>Payment Date</b>	<b>Payment Amount</b>
TRALIAN OPERATING, LLC	Contract Services	698532	01/15/2025	6,764.00
AMALGAMATED TRANSIT UNION	Union Dues	698377	01/08/2025	6,532.18
AMALGAMATED TRANSIT UNION	Union Dues	698548	01/22/2025	6,495.84
PALM SPRINGS MOTORS, INC.	Inventory Repair Parts	698693	01/29/2025	5,567.33
HD INDUSTRIES	Inventory Repair Parts	698589	01/22/2025	5,298.56
SOCALGAS	Utilities	698527	01/15/2025	5,276.27
PALM SPRINGS AIR MUSEUM, INC.	SunLine Events Expense	698431	01/08/2025	5,262.50
ROBERT HALF	Temporary Help	698438	01/08/2025	5,108.96
TPX COMMUNICATIONS	Communications Service	698531	01/15/2025	4,794.44
NFI PARTS	Inventory Repair Parts	698646	01/29/2025	4,786.30
JOSEPH LYNN FRIEND	Contracted Services	698509	01/15/2025	4,500.00
ANDREA CARTER & ASSOCIATES	Marketing & Communication Services	698653	01/29/2025	4,410.00
TWO KNIGHTS INSURANCE SERVICES	Benefit Management Expenses	698626	01/22/2025	4,402.50
FATBOY TACOS AND CATERING	SunLine Events Expense	698380	01/08/2025	4,200.00
IMPERIAL IRRIGATION DIST	Utilities	698672	01/29/2025	4,110.30
SCOTT FAMILY TOOLS	WIP-Fixed Assets-Misc Equipment-Project Acct# 2412-03	698503	01/15/2025	3,848.13
GARON WYATT INVESTIGATIVE SERVICES, LLC.	Insurance Loss	698493	01/15/2025	3,761.63
ROBERT HALF	Temporary Help	698701	01/29/2025	3,596.00
ROBERT HALF	Temporary Help	698616	01/22/2025	3,596.00
THE LEFLORE GROUP LLC	WIP-Liquid Hydrogen Refueling -Project Acct#2211-02	698524	01/15/2025	3,595.22
DOCUSIGN, INC.	Computer/Network Software Agreement	698575	01/22/2025	3,463.42
ULINE, INC.	Facility Maintenance	698454	01/08/2025	3,396.95
OPW FUELING COMPONENTS	Inventory Repair Parts-SunFuels	698692	01/29/2025	3,385.29
ALPHA MEDIA LLC	Advertising	698463	01/15/2025	3,333.00
PRUDENTIAL OVERALL SUPPLY	Uniforms	698610	01/22/2025	3,321.38
CHARTER COMMUNICATIONS	Utilities	698528	01/15/2025	3,272.26
FRONTIER COMMUNICATIONS	Utilities- OPS Bldg	698583	01/22/2025	3,168.00
BRYAN VALENZUELA	Reimbursement Expense	698554	01/22/2025	3,048.70
VIRGINKAR AND ASSOCIATES, INC.	WIP-Upgrade for CAD/AVL System-Project Acct#2309-00	698536	01/15/2025	2,997.00
AEG MANAGEMENT PALM SPRINGS, LLC	SunLine Events Expense	698640	01/23/2025	2,813.50
NICK'S PIZZA AND CATERING	SunLine Events Expense	698391	01/08/2025	2,801.50
FORENSIC DRUG TESTING SERVICES	Alcohol & Drug Testing	698491	01/15/2025	2,768.10
HELIXSTORM	Computer Supplies	698590	01/22/2025	2,749.99
AMERICAN MOVING PARTS	Inventory Repair Parts	698652	01/29/2025	2,738.61
MOHAWK MFG & SUPPLY CO	Inventory Repair Parts	698422	01/08/2025	2,696.77
YELLOW CAB OF THE DESERT	Taxi Voucher Program	698543	01/15/2025	2,647.81
BURRTEC WASTE & RECYCLING SERVICES	Trash Service	698473	01/15/2025	2,621.34
KAMBRIAN CORPORATION	Computer/Network Software Agreement	698413	01/08/2025	2,588.40
CALIFORNIA STATE DISBURSEMENT UNIT	Garnishment	698556	01/22/2025	2,531.99

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

<b>Vendor Filed As Name</b>	<b>Description</b>	<b>Check #</b>	<b>Payment Date</b>	<b>Payment Amount</b>
ROBERT HALF	Temporary Help	698522	01/15/2025	2,525.76
VALLEY OFFICE EQUIPMENT, INC.	Copier Service	698631	01/22/2025	2,467.64
CALIFORNIA STATE DISBURSEMENT UNIT	Garnishment	698386	01/08/2025	2,340.24
ANDERSON COMMUNICATIONS	Radio Repeater Hill Top Rental	698468	01/15/2025	2,205.02
HOME DEPOT CREDIT SERVICES	Facility Maintenance	698499	01/15/2025	2,124.69
SUNBELT RENTALS, INC.	Rental Equipment Expense	698449	01/08/2025	2,122.27
CALIFORNIA DEPARTMENT OF TAX & FEE	Quarterly Used Sale Tax Oct- Dec 2024	698385	01/08/2025	2,004.00
DAVID RZEPINSKI CONSULTING	Consulting	698572	01/22/2025	1,998.75
AMAZON CAPITAL SERVICES, INC	Office Supplies	698649	01/29/2025	1,973.22
CALIFORNIA DEPARTMENT OF TAX & FEE	Annual User Use Fuel Tax for 2024	698643	01/27/2025	1,937.00
SAFETY-KLEEN CORPORATION	Contract Svc-Haz Waste Removal	698525	01/15/2025	1,922.79
OMNITRACS, LLC	General Services	698429	01/08/2025	1,820.00
LUMINATOR TECHNOLOGY GROUP	Repair Parts-Fixed Route	698686	01/29/2025	1,817.00
BATTERY SYSTEMS, INC.	Repair Parts-Support Vehicle	698382	01/08/2025	1,794.10
MARIA AMAVIZCA	Reimbursement Expense	698639	01/23/2025	1,764.62
YELLOW CAB OF THE DESERT	Taxi Voucher Program	698542	01/15/2025	1,756.90
CARNITASBOY	SunLine Events Expense	698415	01/08/2025	1,740.00
LULU CALIFORNIA BISTRO	Staff Development	698644	01/27/2025	1,719.07
SOUTHWEST LIFT & EQUIPMENT, INC.	Equipment Repair-Shop Equipment	698445	01/08/2025	1,693.18
SC FUELS	Lubricants- Oil	698623	01/22/2025	1,614.64
XENIA RACING WRAPS	Decals- Fixed Route	698637	01/22/2025	1,612.46
DECALS BY DESIGN, INC.	Decals	698659	01/29/2025	1,604.62
C V WATER DISTRICT	Utilities	698658	01/29/2025	1,587.55
DEAN BRAMLETT	SunLine Events Expense	698484	01/15/2025	1,573.36
BURRTEC WASTE & RECYCLING SERVICES	Trash Service	698472	01/15/2025	1,502.32
PLAZA TOWING, INC.	Towing Services	698521	01/15/2025	1,475.00
CARQUEST AUTO PARTS STORES	Inventory Repair Parts	698476	01/15/2025	1,473.09
MUTUAL OF OMAHA INSURANCE COMPANY	Supplement Benefits LTD/STD/LIFE Ins Prem	698423	01/08/2025	1,423.07
MICROMED DIAMOND SEAL SYSTEMS INC.	Shop Supplies	698511	01/15/2025	1,380.00
ROMAINE ELECTRIC CORP.	Inventory Repair Parts	698523	01/15/2025	1,343.42
SONSRAY FLEET SERVICES	Repair Parts-Fixed Route	698451	01/08/2025	1,328.76
TOTAL CARE WORK INJURY CLINIC	Medical Exam & Testing	698636	01/22/2025	1,300.00
ROMAINE ELECTRIC CORP.	Inventory Repair Parts	698705	01/29/2025	1,293.00
RWC GROUP	Inventory Repair Parts	698401	01/08/2025	1,269.23
BATTERY SYSTEMS, INC.	Inventory Repair Parts	698470	01/15/2025	1,214.60
SPORTWORKS NORTHWEST, INC.	Inventory Repair Parts	698446	01/08/2025	1,199.80
IMPERIAL IRRIGATION DIST	Utilities	698406	01/08/2025	1,163.08
JOHN QUE'S SMOKEOUT	SunLine Events Expense	698544	01/16/2025	1,095.00
TEAMSTERS LOCAL 1932	Union Dues	698625	01/22/2025	1,071.97

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

<b>Vendor Filed As Name</b>	<b>Description</b>	<b>Check #</b>	<b>Payment Date</b>	<b>Payment Amount</b>
TEAMSTERS LOCAL 1932	Union Dues	698450	01/08/2025	1,050.13
ABSOLUTE SELF STORAGE	Storage Rental	698645	01/29/2025	1,023.00
JORGE GARCIA	Reimbursement Expense	698508	01/15/2025	1,000.00
<b>Total Checks Over \$1,000</b>	\$2,884,840.48			
<b>Total Checks Under \$1,000</b>	\$25,571.26			
<b>Total Checks</b>	\$2,910,411.74			

**SunLine Transit Agency**

**CONSENT CALENDAR**

DATE: March 26, 2025

**APPROVE**

TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of Credit Card Statement for January 2025

Summary:

The attached report summarizes the Agency's credit card expenses for January 2025. The report summarizes transactions for the credit card utilized for Procurement which aligns with the statement closing date of January 31, 2025.

There were no credit card expenses charged to the CEO/General Manager's card for January 2025.

Recommendation:

Approve.

**SunLine Transit Agency Visa Credit Card Statement**

**Closing Date: 01/31/2025**

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

	<b>Trans. Date</b>	<b>Post. Date</b>	<b>Name</b>	<b>Detail-Description</b>	<b>Credits</b>	<b>Charges</b>
1	12/30/24	1/2/2025	Co. Riverside Transportation	Commercial Fire Dept. Deposit Service Fees for Backup Generator Project		\$ 24.08
2	12/30/24	1/2/2025	Co. Riverside Transportation	Commercial Fire Dept. Deposit for Backup Generator Project		\$ 1,056.00
3	01/02/25	1/3/2025	Expedia	CTW Annual Conference for Bryan Valenzuela - Lodging Expense		\$ 873.68
4	01/02/25	1/3/2025	Expedia	CTW Annual Conference for Isabel Vizcarra - Lodging Expense		\$ 873.68
5	01/02/25	1/6/2025	United Airlines	CTW Annual Conference for Isabel Vizcarra - Flight Expense		\$ 358.36
6	01/02/25	1/6/2025	United Airlines	CTW Annual Conference for Bryan Valenzuela - Flight Expense		\$ 358.36
7	01/06/25	1/7/2025	The Churro Truck	Year End Employee Celebration Dinner Expenses		\$ 2,458.50
8	01/06/25	1/8/2025	Signature Party Rentals	Year End Employee Celebration Dinner Expenses		\$ 1,722.02
9	01/14/25	1/16/2025	APTA	APTA Marketing & Communication Workshop for Karina Villalpando - Registration Fee		\$ 989.00
10	01/14/25	1/16/2025	APTA	APTA Marketing & Communication Workshop for Carmen Cubero - Registration Fee		\$ 989.00
11	01/15/25	1/15/2025	Expedia	APTA Marketing & Communication Workshop for Carmen Cubero - Lodging Expense		\$ 560.74
12	01/15/25	1/15/2025	Expedia	APTA Marketing & Communication Workshop for Karina Villalpando - Flight Expense		\$ 560.74
13	01/15/25	1/17/2025	United Airlines	12th Annual California Summit Driving Progress Toward 2030 for Edith Hernandez - Flight Expense		\$ 384.37
14	01/16/25	1/16/2025	Expedia	12th Annual California Summit Driving Progress Toward 2030 for Edith Hernandez - Lodging Expense		\$ 657.96
15	01/16/25	1/17/2025	Sam's Club	Boardroom Supplies		\$ 296.48
16	01/23/25	1/27/2025	United Airlines	CTW Annual Conference for George Hernandez - Flight/Seat Charge Expense		\$ 16.99
17	01/23/25	1/27/2025	United Airlines	CTW Annual Conference for Francisco Ojeda - Flight/Seat Charge Expense		\$ 14.99

	Trans. Date	Post. Date	Name	Detail-Description	Credits	Charges
18	01/23/25	1/27/2025	United Airlines	CTW Annual Conference for Norma Hernandez - Flight/Seat Charge Expense		\$ 16.99
19	01/23/25	1/27/2025	United Airlines	CTW Annual Conference for Francisco Ojeda - Flight/Seat Charge Expense		\$ 16.99
20	01/23/25	1/27/2025	United Airlines	CTW Annual Conference for George Hernandez - Flight/Seat Charge Expense		\$ 19.99
21	01/23/25	1/27/2025	United Airlines	CHBC Fuel Cell Bus Workshop for George Morales & Mike Hayes - Flight Expense		\$ 16.99
22	01/23/25	1/27/2025	Southwest Airlines	CTW Annual Conference for Francisco Ojeda - Flight/Seat Charge Expense		\$ 1,135.32
23	01/23/25	1/27/2025	United Airlines	CTW Annual Conference for George Hernandez - Flight/Seat Charge Expense		\$ 11.99
24	01/23/25	1/27/2025	United Airlines	CTW Annual Conference for Norma Hernandez - Flight/Seat Charge Expense		\$ 16.99
25	01/23/25	1/27/2025	United Airlines	CTW Annual Conference for Norma Hernandez - Flight/Seat Charge Expense		\$ 19.99
26	01/23/25	1/27/2025	United Airlines	CTW Annual Conference for Norma Hernandez - Flight/Seat Charge Expense		\$ 16.99
27	01/23/25	1/27/2025	United Airlines	CTW Annual Conference for George Hernandez - Flight/Seat Charge Expense		\$ 11.99
28	01/23/25	1/27/2025	United Airlines	CTW Annual Conference for George Hernandez - Flight/Seat Charge Expense		\$ 11.99
29	01/24/25	1/27/2025	United Airlines	CTW Annual Conference for George Hernandez - Flight Expense		\$ 273.78
30	01/24/25	1/27/2025	Hotelsshattuckp	CHBC Fuel Cell Bus Workshop for George Morales - Lodging Expense		\$ 815.30
31	01/24/25	1/27/2025	United Airlines	CTW Annual Conference for Francisco Ojeda - Flight Expense		\$ 273.78
32	01/24/25	1/27/2025	United Airlines	CTW Annual Conference for Norma Hernandez - Flight Expense		\$ 273.78
33	01/24/25	1/27/2025	Hotelshattuckp	CHBC Fuel Cell Bus Workshop for Mike Hayes - Lodging Expense		\$ 815.30
34	01/28/25	1/29/2025	TrainHR	The Fundamentals of Succession Planning Webinar for Greg Wildman - Webinar Fee		\$ 145.00
35	01/28/25	1/29/2025	Springer Pumps, Inc.	Parts for Bus Wash Pump		\$ 324.82
36	01/29/25	1/30/2025	Springer Pumps, Inc.	Pump Seal Kit for Electrolyzer Cooling Tower Pump		\$ 424.26
37	01/30/25	1/31/2025	CTC-VIS	CARB Clean Truck Reporting Fees - January 2025		\$ 5.59

	<b>Trans. Date</b>	<b>Post. Date</b>	<b>Name</b>	<b>Detail-Description</b>	<b>Credits</b>	<b>Charges</b>
38	01/30/25	1/31/2025	CTC-VIS	CARB Clean Truck Reporting Service Fee - January 2025		\$ 187.08
39	01/30/25	1/31/2025	Fred Pryor Career Track	Pryor Learning Solutions for Sharon Barone + New Person		\$ 458.00
40	01/30/25	1/31/2025	LIMC	IIMC Membership - Annual Dues Fee		\$ 195.00
				Totals:	\$ -	\$ 17,682.86





Reporting Period : 1/1/2025 - 1/31/2025

**Statement Summary**

<b>Name</b>	Ray Stevens	<b>Company</b>	Sunline Transit Agency
<b>Account #</b>	XXXX-XXXX-XXXX [REDACTED]	<b>Currency</b>	US Dollar
<b>Reporting Period</b>	1/1/2025 - 1/31/2025		

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
1 12/30/2024	1/2/2025	Co Riverside Transportati 951-9550533, IN					24.08
		Purchase Co Riverside Transportati	General Ledger Code: 5099900002				
		Commercial Fire Department Deposit	Performance Department - 2407-00				
<hr/>							
2 12/30/2024	1/2/2025	Co Of Riverside Transport 951-9551800, CA					1,056.00
		Purchase Co Of Riverside Transport	General Ledger Code: 5099900002				
		Commercial Fire Department Deposit - Service Fee	Performance Department - 2407-00				
<hr/>							
3 1/2/2025	1/3/2025	Expedia 72998624075845 Expedia.Com, WA					873.68
		Purchase Expedia 72998624075845	General Ledger Code: 5090200000				
		Approved Travel for Bryan Valenzuela - CTW Annual Conference - Lodging Charge	Safety Department - 00-15-5090200000				
<hr/>							
4 1/2/2025	1/3/2025	Expedia 72998615033807 Expedia.Com, WA					873.68
		Purchase Expedia 72998615033807	General Ledger Code: 5090200000				
		<b>Approve Travel for Isabel Vizcarra – CTW Annual Conference – Lodging Charge</b>	<b>Operations Department - 00-11-5090200000</b>				
<hr/>							
5 1/2/2025	1/6/2025	United United.Com, TX					358.36
		Purchase United	General Ledger Code: 5090200000				
		<b>Approve Travel for Isabel Vizcarra – CTW Annual Conference – Flight Charge</b>	<b>Operations Department - 00-11-5090200000</b>				

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
6	1/2/2025	1/6/2025	United United.Com, TX				358.36
	Purchase United		General Ledger Code: 5090200000				
	Approved Travel for Bryan Valenzuela - CTW Annual Conference - Flight Charge		Safety Department - 00-15-5090200000				
7	1/6/2025	1/7/2025	Sq *the Churro Truck Gosq.Com, CA				2,458.50
	Purchase Sq *the Churro Truck		General Ledger Code: 5099900002				
	PR 22336 - Year End Celebration - The Churro Truck		Human Resources - 00-32-5090201000				
8	1/6/2025	1/8/2025	Signature Party Rentals Santa Ana, CA				1,722.02
	Purchase Signature Party Rentals		General Ledger Code: 5030600300				
	PR 22340 - Tables, Chairs, Table Cloths, Labor Setup and Pickup for Year End Celebration		Human Resources - 00-32-5090201000				
9	1/14/2025	1/16/2025	Apta 202-4964800, DC				989.00
	Purchase Apta		General Ledger Code: 5090100000				
	Approved Travel for Karina Villalpando – APTA Marketing & Communications Workshop - Registration Charge		Marketing Department - 00-31-5090200000				
10	1/14/2025	1/16/2025	Apta 202-4964800, DC				989.00
	Purchase Apta		General Ledger Code: 5090100000				
	Approved Travel for Carmen Cubero – APTA Marketing & Communications Workshop - Registration Charge		Marketing Department - 00-31-5090200000				
11	1/15/2025	1/15/2025	Expedia 73008536247436 Expedia.Com, WA				560.74
	Purchase Expedia 73008536247436		General Ledger Code: 5090200000				
	Approved Travel for Carmen Cubero – APTA Marketing & Communications Workshop - Lodging Charge		Marketing Department - 00-31-5090200000				

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
12	1/15/2025	1/15/2025	Expedia 73008538674416 Expedia.Com, WA				560.74
Purchase Expedia 73008538674416			General Ledger Code: 5090200000				
Approved Travel for Karina Villalpando – APTA Marketing & Communications Workshop				Marketing Department - 00-31-5090200000			
13	1/15/2025	1/17/2025	United United.Com, TX				384.37
Purchase United			General Ledger Code: 5090200000				
Approved Travel for Edith Hernandez – 12th Annual California Summit Driving Progress Toward 2030 - Flight Charge				Executive Department - 00-40-5090200000			
14	1/16/2025	1/16/2025	Expedia 73009281689811 Expedia.Com, WA				657.96
Purchase Expedia 73009281689811			General Ledger Code: 5090200000				
Approved Travel for Edith Hernandez – 12th Annual California Summit Driving Progress Toward 2030 Lodging Charge				Executive Department - 00-40-5090200000			
15	1/16/2025	1/17/2025	Samsclub #6609 Palm Desert, CA				296.48
Purchase Samsclub #6609			General Ledger Code: 5099900002				
PR 22432 - Boardroom Supplies				Facilities Department - 00-23-5049900002			
16	1/23/2025	1/27/2025	United United.Com, TX				16.99
Purchase United			General Ledger Code: 5090200000				
Approved Travel for George Hernandez – CTW Annual Conference - Seat Charge				Maintenance Department - 00-21-5090200000			
17	1/23/2025	1/27/2025	United United.Com, TX				14.99
Purchase United			General Ledger Code: 5090200000				
Approved Travel for Francisco Ojeda – CTW Annual Conference - Seat Charge				Maintenance Department - 00-21-5090200000			

Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
18 1/23/2025	1/27/2025	United United.Com, TX					16.99
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Norma Hernandez - CTW Annual Conference - Seat Charge				Operations Department - 00-11-5090200000	
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19 1/23/2025	1/27/2025	United United.Com, TX					16.99
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Francisco Ojeda – CTW Annual Conference - Seat Charge				Maintenance Department - 00-21-5090200000	
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20 1/23/2025	1/27/2025	United United.Com, TX					19.99
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for George Hernandez – CTW Annual Conference - Seat Charge				Maintenance Department - 00-21-5090200000	
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21 1/23/2025	1/27/2025	United United.Com, TX					16.99
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Francisco Ojeda – CTW Annual Conference - Seat Charge				Maintenance Department - 00-21-5090200000	
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22 1/23/2025	1/27/2025	Southwes 800-435-9792, TX					1,135.32
		Purchase Southwes	General Ledger Code: 5090200000				
		Approved Travel for George Morales and Mike Hayes – CHBC Fuel Cell Bus Workshop - Flight Charge				Maintenance Department - 00-21-5090200000	
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23 1/23/2025	1/27/2025	United United.Com, TX					11.99
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Francisco Ojeda – CTW Annual Conference - Seat Charge				Maintenance Department - 00-21-5090200000	
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Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
24 1/23/2025	1/27/2025	United United.Com, TX					16.99
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Norma Hernandez - CTW Annual Conference - Seat Charge		Operations Department - 00-11-5090200000			
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25 1/23/2025	1/27/2025	United United.Com, TX					19.99
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Norma Hernandez - CTW Annual Conference - Seat Charge		Operations Department - 00-11-5090200000			
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26 1/23/2025	1/27/2025	United United.Com, TX					16.99
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Norma Hernandez - CTW Annual Conference - Seat Charge		Operations Department - 00-11-5090200000			
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27 1/23/2025	1/27/2025	United United.Com, TX					11.99
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for George Hernandez – CTW Annual Conference - Seat Charge		Maintenance Department - 00-21-5090200000			
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28 1/23/2025	1/27/2025	United United.Com, TX					11.99
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for George Hernandez – CTW Annual Conference - Seat Charge		Maintenance Department - 00-21-5090200000			
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29 1/24/2025	1/27/2025	United United.Com, TX					273.78
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for George Hernandez – CTW Annual Conference - Flight Charge		Maintenance Department - 00-21-5090200000			
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Trans Date	Post Date	Merchant Name	Charge Codes	Approved	Personal	Receipt	Amount
30 1/24/2025	1/27/2025	Htl*hotelshattuckp 800-468-3578, TX					815.30
		Purchase Htl*hotelshattuckp	General Ledger Code: 5090200000				
		Approved Travel for George Morales – CHBC Fuel Cell Bus Workshop - Lodging Charge				Maintenance Department - 00-21-5090200000	
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31 1/24/2025	1/27/2025	United United.Com, TX					273.78
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Francisco Ojeda – CTW Annual Conference - Flight Charge				Maintenance Department - 00-21-5090200000	
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32 1/24/2025	1/27/2025	United United.Com, TX					273.78
		Purchase United	General Ledger Code: 5090200000				
		Approved Travel for Norma Hernandez - CTW Annual Conference - Flight Charge				Operations Department - 00-11-5090200000	
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33 1/24/2025	1/27/2025	Htl*hotelshattuckp 800-468-3578, TX					815.30
		Purchase Htl*hotelshattuckp	General Ledger Code: 5090200000				
		Approved Travel for Mike Hayes – CHBC Fuel Cell Bus Workshop - Lodging Charge				Maintenance Department - 00-21-5090200000	
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34 1/28/2025	1/29/2025	Trainhr Trainhrlearn, CA					145.00
		Purchase Trainhr	General Ledger Code: 5049900010				
		PR 22488 - The Fundamentals of Succession Planning Webinar for Greg Wildman				Human Resources - 00-32-5049900000	
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35 1/28/2025	1/29/2025	Springer Pumps Llc 866-7776060, PA					324.82
		Purchase Springer Pumps Llc	General Ledger Code: 5030500010				
		PR 22358 - Parts for Bus Wash Pump				Facilities Department 00-23-5049900026	
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**SunLine Transit Agency**  
**CONSENT CALENDAR**

DATE: March 26, 2025 **APPROVE**

TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of Monthly Budget Variance Report for January 2025

Summary:

The budget variance report compares revenues and expenses to the respective line item budgets. The report identifies current monthly revenues and expenses as well as fiscal year to date (FYTD) values. The budgetary figures are represented as a straight line budget. Accordingly, the current monthly budget values are calculated by taking 1/12<sup>th</sup> of the annual budget. The FYTD budget values for the month of January 2025 are equal to 7/12<sup>ths</sup> of the yearly budget.

Year to Date Summary

- As of January 31, 2025, the Agency's FYTD revenues are \$603,606 or 21.14% below the FYTD budget.
- As of January 31, 2025, the Agency's FYTD expenditures are \$849,122 or 2.95% below the FYTD budget.

Monthly Spotlight:

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

Recommendation:

Approve.

SunLine Transit Agency  
Budget Variance Report  
January 2025

Description	FY25 Total Budget	Current Month			Fiscal Year to Date			
		Actual	Budget	Positive (Negative)	FYTD Actual	FY25 FYTD Budget	Positive (Negative)	Percentage Remaining
<b>Operating Revenues:</b>								
Passenger Revenue	1,816,893	152,990	151,408	1,582	977,203	1,059,854	(82,651)	46.2%
Other Revenue	3,078,163	125,326	256,514	(131,188)	1,274,640	1,795,595	(520,955)	58.6%
<b>Total Operating Revenue</b>	<b>4,895,056</b>	<b>278,316</b>	<b>407,921</b>	<b>(129,606)</b>	<b>2,251,843</b>	<b>2,855,449</b>	<b>(603,606)</b>	<b>54.0%</b>
<b>Operating Expenses:</b>								
Operator & Mechanic Salaries & Wages	11,239,225	912,810	936,602	23,792	6,276,204	6,556,215	280,011	44.2%
Operator & Mechanic Overtime	1,241,785	183,896	103,482	(80,414)	1,006,438	724,375	(282,064)	19.0%
Administration Salaries & Wages	7,861,873	595,921	655,156	59,235	4,214,183	4,586,093	371,910	46.4%
Administration Overtime	126,561	48,627	10,547	(38,080)	168,577	73,827	(94,749)	-33.2%
Fringe Benefits	11,105,305	1,281,079	925,442	(355,637)	5,896,969	6,478,095	581,126	46.9%
Communications	287,782	32,369	23,982	(8,388)	170,230	167,873	(2,357)	40.8%
Legal Services	687,176	105,897	57,265	(48,633)	738,629	400,853	(337,777)	-7.5%
Computer/Network Software Agreement	1,096,582	149,124	91,382	(57,742)	638,098	639,673	1,575	41.8%
Uniforms	99,824	2,116	8,319	6,203	38,547	58,231	19,684	61.4%
Contracted Services	1,556,640	73,379	129,720	56,341	517,692	908,040	390,348	66.7%
Equipment Repairs	26,500	4,990	2,208	(2,782)	17,311	15,458	(1,852)	34.7%
Security Services	168,000	12,345	14,000	1,655	86,014	98,000	11,986	48.8%
Fuel - CNG	1,920,006	153,573	160,001	6,427	616,257	1,120,004	503,747	67.9%
Fuel - Hydrogen	1,443,827	32,092	120,319	88,227	1,026,372	842,232	(184,140)	28.9%
Tires	234,000	17,186	19,500	2,314	142,133	136,500	(5,633)	39.3%
Office Supplies	81,260	6,185	6,772	587	39,237	47,402	8,165	51.7%
Travel/Training	248,200	11,671	20,683	9,013	101,136	144,783	43,647	59.3%
Repair Parts	2,008,500	81,255	167,375	86,120	889,807	1,171,625	281,818	55.7%
Facility Maintenance	87,000	4,773	7,250	2,477	26,119	50,750	24,631	70.0%
Electricity - CNG & Hydrogen	1,090,000	39,328	90,833	51,506	339,443	635,833	296,391	68.9%
Natural Gas	2,030,000	114,006	169,167	55,161	803,449	1,184,167	380,718	60.4%
Water and Gas	16,000	972	1,333	362	6,493	9,333	2,840	59.4%
Insurance Losses	1,235,000	259,124	102,917	(156,208)	1,109,531	720,417	(389,114)	10.2%
Insurance Premium - Property	200,000	19,055	16,667	(2,388)	133,384	116,667	(16,717)	33.3%
Repair Claims	100,000	-	8,333	8,333	(600)	58,333	58,933	100.6%
Fuel Taxes	124,500	8,783	10,375	1,592	57,911	72,625	14,714	53.5%
Other Expenses	7,164,078	636,201	597,007	(39,194)	4,182,494	4,179,046	(3,448)	41.6%
Self Consumed Fuel	(4,062,246)	(184,833)	(338,521)	(153,687)	(1,264,373)	(2,369,644)	(1,105,270)	68.9%
<b>Total Operating Expenses (Before Depreciation)</b>	<b>49,417,378</b>	<b>4,601,923</b>	<b>4,118,115</b>	<b>(483,808)</b>	<b>27,977,682</b>	<b>28,826,804</b>	<b>849,122</b>	<b>43.4%</b>
<b>Operating Expenses in Excess of Operating Revenue</b>		<b>\$ (4,323,608)</b>			<b>\$ (25,725,839)</b>			
<b>Subsidies:</b>								
Local	8,419,000	817,578	701,583	(115,994)	4,864,657	4,911,083	46,426	42.2%
State	30,588,336	2,970,464	2,549,028	(421,436)	17,674,518	17,843,196	168,678	42.2%
Federal	5,514,986	535,566	459,582	(75,984)	3,186,663	3,217,075	30,412	42.2%
<b>Total Subsidies</b>	<b>44,522,322</b>	<b>4,323,608</b>	<b>3,710,194</b>	<b>(613,414)</b>	<b>25,725,839</b>	<b>25,971,355</b>	<b>245,516</b>	<b>42.2%</b>
<b>Net Operating Gain (Loss) After Subsidies</b>	<b>\$ (0)</b>	<b>\$ -</b>			<b>\$ -</b>			

SunLine Transit Agency  
Budget Variance Report  
January 2025

Description	FY25 Total Budget	Current Month			Fiscal Year to Date			
		Actual	Budget	Positive (Negative)	FYTD Actual	FY25 FYTD Budget	Positive (Negative)	Percentage Remaining
<b>Operating Expenses:</b>								
Wages & Benefits	31,574,749	3,022,333	2,631,229	(391,104)	17,562,370	18,418,604	856,233	44.4%
Services	6,903,050	641,075	575,254	(65,821)	3,851,777	4,026,779	175,002	44.2%
Fuels & Lubricants	3,581,133	191,949	298,428	106,478	1,718,638	2,088,994	370,356	52.0%
Tires	234,000	17,186	19,500	2,314	142,133	136,500	(5,633)	39.3%
Materials and Supplies	2,607,460	135,982	217,288	81,306	1,174,829	1,521,018	346,189	54.9%
Utilities	3,554,000	188,337	296,167	107,829	1,380,922	2,073,167	692,245	61.1%
Casualty & Liability	3,678,540	501,953	306,545	(195,408)	2,694,761	2,145,815	(548,946)	26.7%
Taxes and Fees	124,500	8,783	10,375	1,592	57,911	72,625	14,714	53.5%
Miscellaneous Expenses	1,222,192	79,157	101,849	22,692	658,714	712,945	54,232	46.1%
Self Consumed Fuel	(4,062,246)	(184,833)	(338,521)	(153,687)	(1,264,373)	(2,369,644)	(1,105,270)	68.9%
<b>Total Operating Expenses (Before Depreciation)</b>	<b>49,417,378</b>	<b>4,601,923</b>	<b>4,118,115</b>	<b>(483,808)</b>	<b>27,977,682</b>	<b>28,826,804</b>	<b>849,122</b>	<b>43.4%</b>
<b>Revenues:</b>								
Passenger Revenue	1,816,893	152,990	151,408	1,582	977,203	1,059,854	(82,651)	46.2%
Other Revenue	3,078,163	125,326	256,514	(131,188)	1,274,640	1,795,595	(520,955)	58.6%
<b>Total Operating Revenue</b>	<b>4,895,056</b>	<b>278,316</b>	<b>407,921</b>	<b>(129,606)</b>	<b>2,251,843</b>	<b>2,855,449</b>	<b>(603,606)</b>	<b>54.0%</b>
<b>Net Operating Gain (Loss)</b>		<b>\$ (4,323,608)</b>			<b>\$ (25,725,839)</b>			
<b>Subsidies:</b>								
Local	8,419,000	817,578	701,583	(115,994)	4,864,657	4,911,083	46,426	42.2%
State	30,588,336	2,970,464	2,549,028	(421,436)	17,674,518	17,843,196	168,678	42.2%
Federal	5,514,986	535,566	459,582	(75,984)	3,186,663	3,217,075	30,412	42.2%
<b>Total Subsidies</b>	<b>44,522,322</b>	<b>4,323,608</b>	<b>3,710,194</b>	<b>(613,414)</b>	<b>25,725,839</b>	<b>25,971,355</b>	<b>245,516</b>	<b>42.2%</b>
<b>Net Operating Gain (Loss) After Subsidies</b>	<b>\$ (0)</b>	<b>\$ -</b>			<b>\$ -</b>			

**Budget Variance Analysis - SunLine Transit Agency**

**Passenger Revenue**

- The unfavorable variance in passenger revenue is due to lower than expected revenue over budgeted values.
- As of January, ridership was at 7.3% above FY24 FYTD totals.
- Total system ridership was 113,016 trips above FY24 FYTD amounts.

**Ridership**

	FY24-January	FY25-January	Variance	%Δ
Fixed Route	219,727	232,606	12,879	5.9%
Paratransit	10,067	9,338	(729)	-7.2%
SunRide	2,076	1,802	(274)	-13.2%
System Total	231,870	243,746	11,876	5.1%

**Ridership**

	FYTD-FY24	FYTD-FY25	Variance	%Δ
Fixed Route	1,457,663	1,573,462	115,799	7.9%
Paratransit	70,189	65,634	(4,555)	-6.5%
SunRide	12,567	14,339	1,772	14.1%
System Total	1,540,419	1,653,435	113,016	7.3%

**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**

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

**Operator & Mechanic Overtime**

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

**Administration Salaries & Wages**

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

**Administration Overtime**

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

**Fringe Benefits**

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

**Communications**

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

**Legal Services**

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

**Computer/Network Software Agreement**

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

**Uniforms**

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

**Contracted Services**

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

**Equipment Repairs**

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

**Security Services**

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

**Fuel - CNG**

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

**Fuel - Hydrogen**

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

**Tires**

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

**Office Supplies**

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

**Travel/Training**

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

**Repair Parts**

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

**Facility Maintenance**

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

**Electricity - CNG & Hydrogen**

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

**Natural Gas**

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

**Water and Gas**

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

**Insurance Losses**

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

**Insurance Premium - Property**

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

**Repair Claims**

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

**Fuel Taxes**

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

**Other Expenses**

- 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: March 26, 2025 **APPROVE**

TO: Finance/Audit Committee  
Board of Directors

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

Summary:

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

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

<b>Vendor</b>	<b>Purpose</b>	<b>Amount</b>
Shaw, Yoder, Antwih, Schmelzer & Lange	Short Term Legislative Services	\$54,000.00

Recommendation:

Approve.

**Contracts Signed Between \$25,000 and \$250,000**  
**January 2025**

<b>Vendor</b>	<b>Product/Service</b>	<b>Need</b>	<b>Budgeted</b>	<b>Budgeted Amount</b>	<b>Cost</b>	<b>Type</b>
Shaw, Yoder, Antwih, Schmelzer & Lange	Legislative Services	Short Term Legislative Services	FY25	\$54,000.00	\$54,000.00	Agreement



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

DATE: March 26, 2025

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

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

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

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

## Union

Asset Class		Actual	Range
<b>Growth Assets</b>			
	Domestic Equity	29.0%	16% – 56%
	International Equity	15.6%	0% - 39%
	Other	7.4%	0% – 20%
<b>Income Assets</b>			
	Fixed Income	40.7%	25% - 65%
	Other	4.5%	0% – 20%
<b>Real Return Assets</b>		1.6%	0% – 20%

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

Asset Class		Actual	Range
<b>Growth Assets</b>			
	Domestic Equity	28.9%	16% – 56%
	International Equity	15.4%	0% - 39%
	Other	7.4%	0% – 20%
<b>Income Assets</b>			
	Fixed Income	40.7%	25% - 65%
	Other	4.5%	0% – 20%
<b>Real Return Assets</b>		1.6%	0% – 20%
<b>Cash Equivalents</b>		1.5%	0% – 20%

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

For the month of January, the market value of assets increased by \$667,201 and \$669,111 for the union and non-union plans, respectively.

## Month to Month Asset Comparison

Month	Market Value - Union	Market Value – Non-Union
December 2024	\$43,226,790	\$43,405,757
January 2025	\$43,893,991	\$44,074,868
Increase (Decrease)	\$667,201	\$669,111

Recommendation:

Approve.



Detail of Securities Held & Market Analytics

For the Month Ending January 31, 2025

SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]

Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
<b>Exchange-Traded Fund - Bond</b>									
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	7,097.00	50.32	357,121.04	51.87	368,121.39	11,000.35	0.84
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	631.00	56.68	35,765.08	51.87	32,729.97	(3,035.11)	0.07
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	1,776.00	57.66	102,405.94	51.87	92,121.12	(10,284.82)	0.21
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	2,389.00	60.30	144,056.70	51.87	123,917.43	(20,139.27)	0.28
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	1,146.00	61.12	70,043.52	51.87	59,443.02	(10,600.50)	0.14
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	633.00	56.98	36,068.34	51.87	32,833.71	(3,234.63)	0.07
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	965.00	61.00	58,865.00	51.87	50,054.55	(8,810.45)	0.10
ISHARES CORE U.S. AGGREGATE	464287226	8278395	4,049.00	98.87	400,324.63	97.40	394,372.60	(5,952.03)	0.90
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,322.00	99.12	329,276.64	97.40	323,562.80	(5,713.84)	0.74
ISHARES CORE U.S. AGGREGATE	464287226	8278395	6,446.00	92.76	597,930.32	97.40	627,840.40	29,910.08	1.43
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,307.00	96.40	318,794.80	97.40	322,101.80	3,307.00	0.73
ISHARES CORE U.S. AGGREGATE	464287226	8278395	17,918.00	98.64	1,767,431.52	97.40	1,745,213.20	(22,218.32)	3.98

<b>Security Type Sub-Total</b>			<b>49,679.00</b>		<b>4,218,083.53</b>	<b>850.09</b>	<b>4,172,311.99</b>	<b>(45,771.54)</b>	<b>9.49</b>
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<b>Exchange-Traded Fund - Equity</b>									
SCHWAB US LARGE-CAP ETF	808524201	17333747	503,068.00	22.54	11,340,829.61	23.87	12,008,233.16	667,403.55	27.36
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	46,244.00	52.35	2,420,864.15	49.94	2,309,425.36	(111,438.79)	5.26
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	2,629.00	39.67	104,292.43	49.94	131,292.26	26,999.83	0.30
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	2,614.00	37.16	97,136.24	49.94	130,543.16	33,406.92	0.30
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	2,193.00	42.17	92,478.81	49.94	109,518.42	17,039.61	0.25
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	6,816.00	38.85	264,801.60	49.94	340,391.04	75,589.44	0.78
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	4,430.00	49.80	220,614.00	49.94	221,234.20	620.20	0.50
VANGUARD TOTAL INTL STOCK	921909768	23836382	6,003.00	61.64	370,024.92	60.92	365,702.76	(4,322.16)	0.83
VANGUARD TOTAL INTL STOCK	921909768	23836382	3,480.00	52.06	181,168.80	60.92	212,001.60	30,832.80	0.48
VANGUARD TOTAL INTL STOCK	921909768	23836382	15,690.00	47.86	750,920.27	60.92	955,834.80	204,914.53	2.18
VANGUARD TOTAL INTL STOCK	921909768	23836382	1,834.00	54.44	99,842.96	60.92	111,727.28	11,884.32	0.25
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,586.00	56.19	145,307.34	60.92	157,539.12	12,231.78	0.36
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,875.00	51.81	148,953.46	60.92	175,145.00	26,191.54	0.40
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,586.00	56.52	146,160.72	60.92	157,539.12	11,378.40	0.36

**Detail of Securities Held & Market Analytics**

For the Month Ending **January 31, 2025**

<b>SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]</b>										
<b>Security Type/Description</b>	<b>Dated Date/Coupon/Maturity</b>	<b>CUSIP</b>	<b>Ticker</b>	<b>Shares</b>	<b>Average Cost/Share</b>	<b>Original Cost</b>	<b>Market Price</b>	<b>Market Value</b>	<b>Unreal G/L on Cost</b>	<b>Percentage</b>
<b>Security Type Sub-Total</b>				<b>603,048.00</b>		<b>16,383,395.31</b>	<b>749.95</b>	<b>17,386,127.28</b>	<b>1,002,731.97</b>	<b>39.61</b>
<b>Money Market Mutual Fund</b>										
FIRST AM GOV OBLIG-Z DTD 01/01/2010 0.000% --		31846V567	351477	515,201.28	1.00	515,201.28	100.00	515,201.28	0.00	1.17
<b>Security Type Sub-Total</b>				<b>515,201.28</b>		<b>515,201.28</b>	<b>100.00</b>	<b>515,201.28</b>	<b>0.00</b>	<b>1.17</b>
<b>Mutual Fund - Bond</b>										
BAIRD CORE PLUS BOND-INST		057071870	7001692	496,492.05	10.88	5,401,227.61	10.04	4,984,780.18	(416,447.43)	11.36
BBH LIMITED DURATION-I		05528X851	7344118	0.03	10.29	0.35	10.44	0.35	0.00	0.00
DOUBLELINE CORE FIX INC-I		258620301	19170004	197,982.65	10.44	2,066,436.29	9.15	1,811,541.20	(254,895.09)	4.13
NYLI MACKAY HIGH YILD CBF-R6		56063N881	121732	136,553.53	5.18	707,808.86	5.22	712,809.46	5,000.60	1.62
PGIM TOTAL RETURN BOND-R6		74440B884	168981	342,541.37	13.32	4,562,842.89	11.87	4,065,966.06	(496,876.83)	9.26
VOYA INTERMEDIATE BOND-R6		92913L569	212412	245,849.94	9.83	2,417,046.14	8.64	2,124,143.42	(292,902.72)	4.84
<b>Security Type Sub-Total</b>				<b>1,419,419.56</b>		<b>15,155,362.14</b>	<b>55.36</b>	<b>13,699,240.67</b>	<b>(1,456,121.47)</b>	<b>31.21</b>
<b>Mutual Fund - Equity</b>										
COHEN & STEERS INST RLTY		19247U106	1428049	14,471.75	52.20	755,473.06	48.44	701,011.65	(54,461.41)	1.60
COLUMBIA SMALL CAP GRW-INST3		19765Y340	195897	9,629.50	28.07	270,300.00	30.86	297,166.30	26,866.30	0.68
GLDMN SCHS GQG PRT INTL-INST		38147N293	51973400	36,861.86	19.35	713,335.27	20.34	749,770.25	36,434.98	1.71
HRDNG LVNR INTL EQTY-INST		412295107	175052	19,680.08	28.64	563,700.77	25.26	497,118.81	(66,581.96)	1.13
HRTFRD SCHR EM MRKT EQ-SDR		41665H789	10575468	12,957.31	15.22	197,181.37	16.99	220,144.77	22,963.40	0.50
UNDISC MGRS BEHAV VAL-R6		904504479	1428076	4,861.61	87.23	424,087.81	86.81	422,036.01	(2,051.80)	0.96
<b>Security Type Sub-Total</b>				<b>98,462.11</b>		<b>2,924,078.28</b>	<b>228.70</b>	<b>2,887,247.79</b>	<b>(36,830.49)</b>	<b>6.58</b>
<b>Separate Account</b>										
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	45,325.00	1.00	45,325.00	111.99	50,758.98	5,433.98	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --		ATEL00019	SA406	49,000.00	1.00	49,000.00	111.99	54,874.57	5,874.57	0.13

**Detail of Securities Held & Market Analytics**

For the Month Ending **January 31, 2025**

SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]									
Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
<b>Separate Account</b>									
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	8,005.07	1.00	8,005.07	111.99	8,964.79	959.72	0.02
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	111.99	50,758.98	5,433.98	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	111.99	50,758.98	5,433.98	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	21,070.00	1.00	21,070.00	111.99	23,596.07	2,526.07	0.05
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	49,000.00	1.00	49,000.00	111.99	54,874.57	5,874.57	0.13
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	111.99	50,758.98	5,433.98	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	49,980.00	1.00	49,980.00	111.99	55,972.06	5,992.06	0.13
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00019	SA406	45,325.00	1.00	45,325.00	111.99	50,758.98	5,433.98	0.12
BLACKSTONE INFRASTRUCTURE PRTNRS F 2 L. DTD 10/01/2024 0.000% --	BKSTONE63	SA495	900,000.00	1.00	900,000.00	100.00	900,000.00	0.00	2.05
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0090	F_GOLUB	180,000.00	1.00	180,000.00	117.89	212,209.54	32,209.54	0.48
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0090	F_GOLUB	1,127,240.00	1.00	1,127,240.00	117.89	1,328,950.46	201,710.46	3.03
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	105,000.00	1.00	105,000.00	139.08	146,031.86	41,031.86	0.33
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	309,750.00	1.00	309,750.00	139.08	430,793.98	121,043.98	0.98
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	180,319.43	1.00	180,319.43	139.08	250,784.58	70,465.15	0.57
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	204,378.01	1.00	204,378.01	139.08	284,244.76	79,866.75	0.65

**Detail of Securities Held & Market Analytics**

For the Month Ending **January 31, 2025**

SUNLINE EMPLOYEES RETIREMENT BARGAINING - [REDACTED]										
Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage	
<b>Separate Account</b>										
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	80,433.93	1.00	80,433.93	139.08	111,865.87	31,431.94	0.25	
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	130,837.59	1.00	130,837.59	139.08	181,966.25	51,128.66	0.41	
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	147,000.00	1.00	147,000.00	139.08	204,444.60	57,444.60	0.47	
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	145,309.38	1.00	145,309.38	139.08	202,093.32	56,783.94	0.46	
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	252,000.00	1.00	252,000.00	139.08	350,476.46	98,476.46	0.80	
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV007	F_NBF	127,930.57	1.00	127,930.57	139.08	177,923.23	49,992.66	0.41	
<b>Security Type Sub-Total</b>			<b>4,293,878.98</b>		<b>4,293,878.98</b>	<b>2,846.46</b>	<b>5,233,861.87</b>	<b>939,982.89</b>	<b>11.95</b>	
<b>Managed Account Sub-Total</b>			<b>6,979,688.93</b>		<b>43,489,999.52</b>	<b>4,830.56</b>	<b>43,893,990.88</b>	<b>403,991.36</b>	<b>100.01</b>	
<b>Securities Sub-Total</b>			<b>\$6,979,688.93</b>		<b>\$43,489,999.52</b>	<b>\$4,830.56</b>	<b>\$43,893,990.88</b>	<b>\$403,991.36</b>	<b>100.01%</b>	
<b>Accrued Interest</b>							<b>\$0.00</b>			
<b>Total Investments</b>							<b>\$43,893,990.88</b>			





Detail of Securities Held & Market Analytics

For the Month Ending January 31, 2025

SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]

Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
<b>Exchange-Traded Fund - Bond</b>									
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	7,130.00	50.32	358,781.60	51.87	369,833.10	11,051.50	0.84
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	631.00	56.68	35,765.08	51.87	32,729.97	(3,035.11)	0.07
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	633.00	56.98	36,068.34	51.87	32,833.71	(3,234.63)	0.07
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	982.00	61.00	59,902.00	51.87	50,936.34	(8,965.66)	0.12
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	2,405.00	60.30	145,021.50	51.87	124,747.35	(20,274.15)	0.28
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	1,779.00	57.66	102,578.92	51.87	92,276.73	(10,302.19)	0.21
ISHARES 5-10Y INV GRADE CORP	464288638	11413317	1,113.00	61.12	68,026.56	51.87	57,731.31	(10,295.25)	0.13
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,317.00	96.40	319,758.80	97.40	323,075.80	3,317.00	0.73
ISHARES CORE U.S. AGGREGATE	464287226	8278395	6,272.00	92.76	581,790.09	97.40	610,892.80	29,102.71	1.39
ISHARES CORE U.S. AGGREGATE	464287226	8278395	3,372.00	99.12	334,232.64	97.40	328,432.80	(5,799.84)	0.75
ISHARES CORE U.S. AGGREGATE	464287226	8278395	17,957.00	98.64	1,771,278.48	97.40	1,749,011.80	(22,266.68)	3.97
ISHARES CORE U.S. AGGREGATE	464287226	8278395	4,049.00	98.87	400,324.63	97.40	394,372.60	(5,952.03)	0.89

<b>Security Type Sub-Total</b>			<b>49,640.00</b>		<b>4,213,528.64</b>	<b>850.09</b>	<b>4,166,874.31</b>	<b>(46,654.33)</b>	<b>9.45</b>
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<b>Exchange-Traded Fund - Equity</b>									
SCHWAB US LARGE-CAP ETF	808524201	17333747	501,560.00	22.54	11,306,834.27	23.87	11,972,237.20	665,402.93	27.15
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	4,430.00	49.80	220,614.00	49.94	221,234.20	620.20	0.50
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	6,915.00	38.85	268,647.75	49.94	345,335.10	76,687.35	0.78
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	2,484.00	39.67	98,540.28	49.94	124,050.96	25,510.68	0.28
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	44,356.00	52.35	2,322,027.73	49.94	2,215,138.64	(106,889.09)	5.03
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	2,614.00	37.16	97,136.24	49.94	130,543.16	33,406.92	0.30
VANGUARD FTSE DEVELOPED ETF	921943858	12373850	2,211.00	42.17	93,237.87	49.94	110,417.34	17,179.47	0.25
VANGUARD TOTAL INTL STOCK	921909768	23836382	3,770.00	52.06	196,266.20	60.92	229,668.40	33,402.20	0.52
VANGUARD TOTAL INTL STOCK	921909768	23836382	16,886.00	47.86	808,160.58	60.92	1,028,695.12	220,534.54	2.33
VANGUARD TOTAL INTL STOCK	921909768	23836382	6,003.00	61.64	370,024.92	60.92	365,702.76	(4,322.16)	0.83
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,469.00	56.19	138,733.11	60.92	150,411.48	11,678.37	0.34
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,470.00	56.52	139,604.40	60.92	150,472.40	10,868.00	0.34
VANGUARD TOTAL INTL STOCK	921909768	23836382	2,875.00	51.81	148,953.46	60.92	175,145.00	26,191.54	0.40
VANGUARD TOTAL INTL STOCK	921909768	23836382	1,375.00	54.44	74,855.00	60.92	83,765.00	8,910.00	0.19

**Detail of Securities Held & Market Analytics**

For the Month Ending **January 31, 2025**

<b>SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]</b>									
<b>Security Type/Description</b>				<b>Average</b>	<b>Original</b>	<b>Market</b>	<b>Market</b>	<b>Unreal G/L</b>	
<b>Dated Date/Coupon/Maturity</b>	<b>CUSIP</b>	<b>Ticker</b>	<b>Shares</b>	<b>Cost/Share</b>	<b>Cost</b>	<b>Price</b>	<b>Value</b>	<b>on Cost</b>	<b>Percentage</b>
<b>Security Type Sub-Total</b>			<b>600,418.00</b>		<b>16,283,635.81</b>	<b>749.95</b>	<b>17,302,816.76</b>	<b>1,019,180.95</b>	<b>39.24</b>
<b>Money Market Mutual Fund</b>									
FIRST AM GOV OBLIG-Z DTD 01/01/2010 0.000% --	31846V567	351477	672,457.70	1.00	672,457.70	100.00	672,457.70	0.00	1.53
<b>Security Type Sub-Total</b>			<b>672,457.70</b>		<b>672,457.70</b>	<b>100.00</b>	<b>672,457.70</b>	<b>0.00</b>	<b>1.53</b>
<b>Mutual Fund - Bond</b>									
BAIRD CORE PLUS BOND-INST	057071870	7001692	500,709.18	10.87	5,441,985.67	10.04	5,027,120.14	(414,865.53)	11.41
BBH LIMITED DURATION-I	05528X851	7344118	0.03	10.29	0.35	10.44	0.35	0.00	0.00
DOUBLELINE CORE FIX INC-I	258620301	19170004	197,498.83	10.44	2,061,514.00	9.15	1,807,114.27	(254,399.73)	4.10
NYLI MACKAY HIGH YILD CBF-R6	56063N881	121732	136,192.31	5.18	705,771.47	5.22	710,923.84	5,152.37	1.61
PGIM TOTAL RETURN BOND-R6	74440B884	168981	346,276.14	13.30	4,604,094.01	11.87	4,110,297.77	(493,796.24)	9.33
VOYA INTERMEDIATE BOND-R6	92913L569	212412	245,317.86	9.83	2,411,425.30	8.64	2,119,546.24	(291,879.06)	4.81
<b>Security Type Sub-Total</b>			<b>1,425,994.34</b>		<b>15,224,790.80</b>	<b>55.36</b>	<b>13,775,002.61</b>	<b>(1,449,788.19)</b>	<b>31.26</b>
<b>Mutual Fund - Equity</b>									
COHEN & STEERS INST RLTY	19247U106	1428049	15,436.53	52.20	805,837.92	48.44	747,745.72	(58,092.20)	1.70
COLUMBIA SMALL CAP GRW-INST3	19765Y340	195897	9,529.75	28.07	267,500.00	30.86	294,087.99	26,587.99	0.67
GLDMN SCHS GQG PRT INTL-INST	38147N293	51973400	36,802.24	19.35	712,235.01	20.34	748,557.52	36,322.51	1.70
HRDNG LVNR INTL EQTY-INST	412295107	175052	19,647.37	28.63	562,530.78	25.26	496,292.55	(66,238.23)	1.13
HRTFRD SCHR EM MRKT EQ-SDR	41665H789	10575468	12,919.82	15.22	196,610.96	16.99	219,507.82	22,896.86	0.50
UNDISC MGRS BEHAV VAL-R6	904504479	1428076	4,811.24	87.23	419,694.20	86.81	417,663.65	(2,030.55)	0.95
<b>Security Type Sub-Total</b>			<b>99,146.95</b>		<b>2,964,408.87</b>	<b>228.70</b>	<b>2,923,855.25</b>	<b>(40,553.62)</b>	<b>6.65</b>
<b>Separate Account</b>									
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	21,070.00	1.00	21,070.00	111.99	23,596.06	2,526.06	0.05
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	111.99	50,758.97	5,433.97	0.12

**Detail of Securities Held & Market Analytics**

For the Month Ending **January 31, 2025**

SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]									
Security Type/Description Dated Date/Coupon/Maturity	CUSIP	Ticker	Shares	Average Cost/Share	Original Cost	Market Price	Market Value	Unreal G/L on Cost	Percentage
<b>Separate Account</b>									
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	8,005.07	1.00	8,005.07	111.99	8,964.79	959.72	0.02
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	111.99	50,758.97	5,433.97	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	111.99	50,758.97	5,433.97	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	111.99	50,758.97	5,433.97	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	45,325.00	1.00	45,325.00	111.99	50,758.97	5,433.97	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	49,000.00	1.00	49,000.00	111.99	54,874.56	5,874.56	0.12
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	49,980.00	1.00	49,980.00	111.99	55,972.05	5,992.05	0.13
ATEL PRIVATE DEBT FUND II DTD 01/01/2010 0.000% --	ATEL00020	SA407	49,000.00	1.00	49,000.00	111.99	54,874.56	5,874.56	0.12
BLACKSTONE INFRASTRUCTURE PRTNRS F 2 L. DTD 10/01/2024 0.000% --	BKSTONE64	SA496	900,000.00	1.00	900,000.00	100.00	900,000.00	0.00	2.04
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0091	F_GOLUB	180,000.00	1.00	180,000.00	117.89	212,209.54	32,209.54	0.48
GOLUB CAPITAL XIV INT'L DTD 01/01/2010 0.000% --	GOLUB0091	F_GOLUB	1,127,240.00	1.00	1,127,240.00	117.89	1,328,950.46	201,710.46	3.02
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	147,000.00	1.00	147,000.00	139.08	204,444.60	57,444.60	0.46
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	105,000.00	1.00	105,000.00	139.08	146,031.86	41,031.86	0.33
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	309,750.00	1.00	309,750.00	139.08	430,793.98	121,043.98	0.98
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	145,309.38	1.00	145,309.38	139.08	202,093.32	56,783.94	0.46

**Detail of Securities Held & Market Analytics**

For the Month Ending **January 31, 2025**

SUNLINE EMPLOYEES RETIREMENT NON-BARGAI - [REDACTED]

<b>Security Type/Description</b> <b>Dated Date/Coupon/Maturity</b>	<b>CUSIP</b>	<b>Ticker</b>	<b>Shares</b>	<b>Average</b> <b>Cost/Share</b>	<b>Original</b> <b>Cost</b>	<b>Market</b> <b>Price</b>	<b>Market</b> <b>Value</b>	<b>Unreal G/L</b> <b>on Cost</b>	<b>Percentage</b>
<b>Separate Account</b>									
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	130,837.59	1.00	130,837.59	139.08	181,966.25	51,128.66	0.41
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	180,319.43	1.00	180,319.43	139.08	250,784.58	70,465.15	0.57
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	127,930.57	1.00	127,930.57	139.08	177,923.23	49,992.66	0.40
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	252,000.00	1.00	252,000.00	139.08	350,476.46	98,476.46	0.80
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	80,433.93	1.00	80,433.93	139.08	111,865.87	31,431.94	0.25
NB SOF V DTD 01/01/2010 0.000% --	NBSOFV008	F_NBF	204,378.01	1.00	204,378.01	139.08	284,244.76	79,866.75	0.64
<b>Security Type Sub-Total</b>			<b>4,293,878.98</b>		<b>4,293,878.98</b>	<b>2,846.46</b>	<b>5,233,861.78</b>	<b>939,982.80</b>	<b>11.88</b>
<b>Managed Account Sub-Total</b>			<b>7,141,535.98</b>		<b>43,652,700.80</b>	<b>4,830.56</b>	<b>44,074,868.41</b>	<b>422,167.61</b>	<b>100.01</b>
<b>Securities Sub-Total</b>			<b>\$7,141,535.98</b>		<b>\$43,652,700.80</b>	<b>\$4,830.56</b>	<b>\$44,074,868.41</b>	<b>\$422,167.61</b>	<b>100.01%</b>
<b>Accrued Interest</b>							<b>\$0.00</b>		
<b>Total Investments</b>							<b>\$44,074,868.41</b>		

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

DATE: March 26, 2025

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

RE: Acceptance of Ridership Report for January 2025

Summary:

	Monthly Ridership Per Mode		Monthly Variance Per Mode	
	Jan 25	Jan 24	Net	Percent
Fixed Route	232,606	219,727	12,879	5.9%
SunRide	2,351	2,076	275	13.2%
Taxi Voucher*	118	196	(78)	(39.8%)
SunDial	9,338	10,067	(729)	(7.2%)
<b>Total</b>	<b>244,413</b>	<b>232,066</b>	<b>12,347</b>	<b>5.3%</b>

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

FY Ridership to Date (All Modes)	
<b>Fiscal Year 2025</b>	1,655,096
<b>Fiscal Year 2024</b>	1,541,742
<b>Ridership Increase</b>	<b>113,354</b>

Fiscal year to date system ridership increased by 113,354 rides or 7.35% compared to the previous fiscal year. The baseline of the attached COVID-19 Recovery chart is calendar year 2020, this allows a comparison of five (5) years.

Recommendation:

Approve.

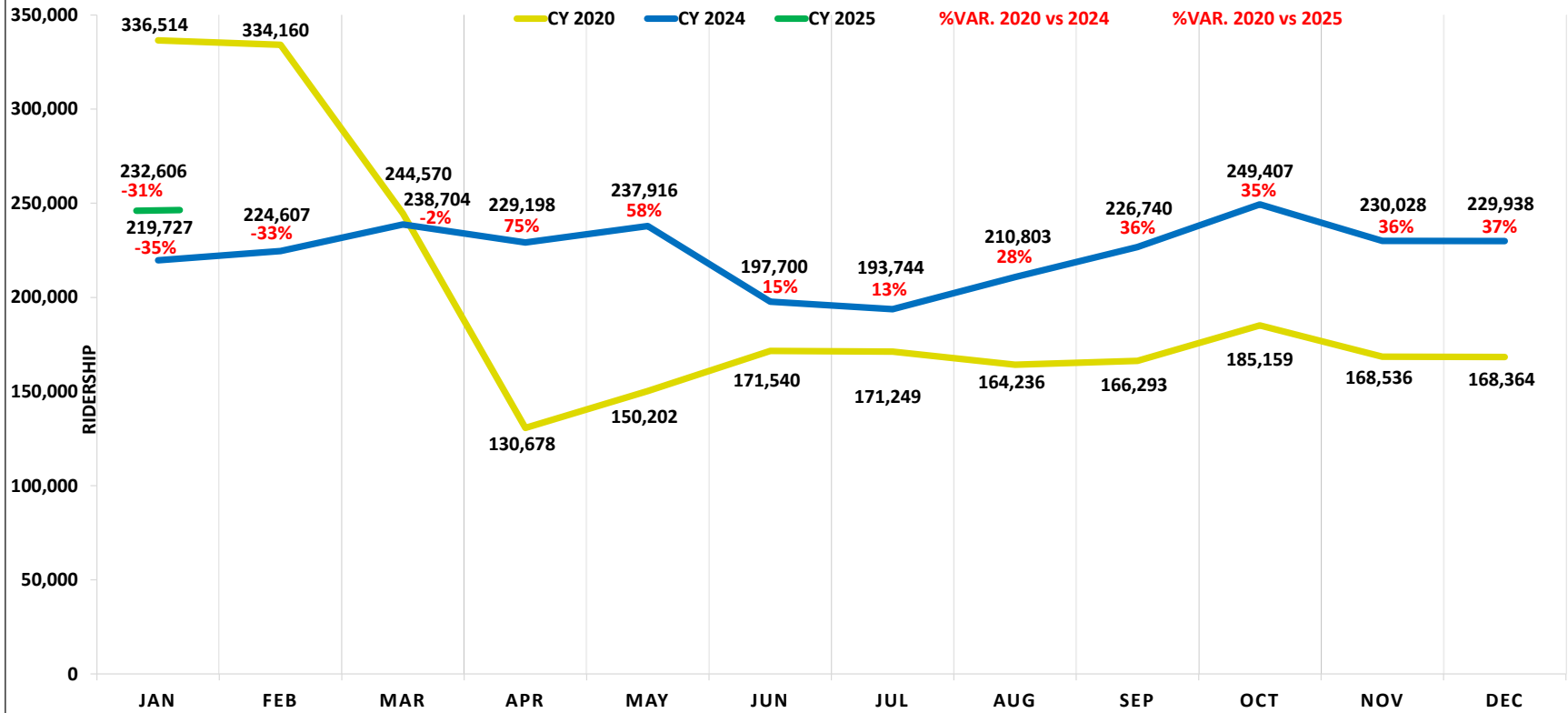


## SunLine Transit Agency Monthly Ridership Report January 2025

Fixed Route	FY 2025		FY 2024		Monthly KPI		Bikes		Wheelchairs	
	Jan 2025	Jan 2024	YTD	YTD	Passengers/ Rev. Hours	Passengers/ Rev. Miles	Monthly	FYTD	Monthly	FYTD
	Route 1EV	51,155	50,039	340,907	338,151	20.6	1.6	2,061	12,733	370
Route 1WV	39,487	36,571	273,380	257,913	15.8	1.3	1,156	9,648	263	2,397
Route 2	64,097	62,811	453,225	413,609	18.3	1.3	2,056	11,771	532	3,559
Route 3	7,484	7,696	54,944	46,066	9.4	0.6	241	2,003	67	667
Route 4	21,204	19,583	138,790	123,348	11.8	0.8	659	3,748	174	772
Route 5	2,500	1,705	17,720	9,371	5.2	0.2	60	590	22	93
Route 6	4,527	3,235	30,290	18,574	8.4	0.6	140	1,096	29	186
Route 7	8,390	8,168	52,503	52,089	10.3	0.8	343	2,356	4	151
Route 8	16,491	15,782	112,809	102,337	10.7	0.7	557	2,958	74	658
Route 9	5,639	5,288	29,913	31,075	9.6	0.4	70	537	21	96
Route 10	2,999	2,299	22,768	19,221	5.8	0.2	14	2,024	5	326
Route 200 SB	113	142	1,060	1,210	8	0	-	6	-	1
Route 400 SB	-	-	-	-	-	-	-	-	-	-
Route 401 SB	-	-	-	-	-	-	-	-	-	-
Route 402 NB	-	-	-	-	-	-	-	-	-	-
Route 403 NB	-	-	-	-	-	-	-	-	-	-
Route 500 SB	-	397	850	1,434	11	-	-	-	-	-
Route 501 NB	-	-	-	-	-	-	-	-	-	-
Route 700 SB/NB	262	245	1,615	2,022	11	1	1	5	-	-
Route 701 SB/NB	1,164	718	5,592	5,007	-	-	5	20	3	7
Route 800 NB	4,720	1,862	19,120	10,703	248	12	4	5	4	10
Route 801 SB	2,348	1,969	13,034	13,768	124	7	-	1	-	1
Route 802 SB	26	266	1,977	3,194	1	0	-	-	-	2
Route 803 NB	-	951	2,965	8,571	-	-	-	-	-	-
<b>Fixed Route Total</b>	<b>232,606</b>	<b>219,727</b>	<b>1,573,462</b>	<b>1,457,663</b>	<b>13</b>	<b>1</b>	<b>7,367</b>	<b>49,501</b>	<b>1,568</b>	<b>10,887</b>
SunRide	2,351	2,076	14,888	12,610	1.0	0.2	-	-	-	-
Taxi Voucher	118	196	1,112	1,280	-	-	-	-	-	-
SunDial	9,338	10,067	65,634	70,189	2	0.1	-	-	-	-
<b>System Total</b>	<b>244,413</b>	<b>232,066</b>	<b>1,655,096</b>	<b>1,541,742</b>	<b>9.8</b>	<b>0.7</b>				
	<b>Jan-25</b>	<b>Jan-24</b>								
Weekdays:	23	23								
Saturdays:	4	4								
Sundays:	4	4								
<b>Total Days:</b>	<b>31</b>	<b>31</b>								

Haul Pass COD contributed with 5,388 rides, CSUSB with 1,458 rides.  
 Mobile Ticketing contributed with 44,905 rides, the total for January 2025 includes 129 paratransit mobile tickets.

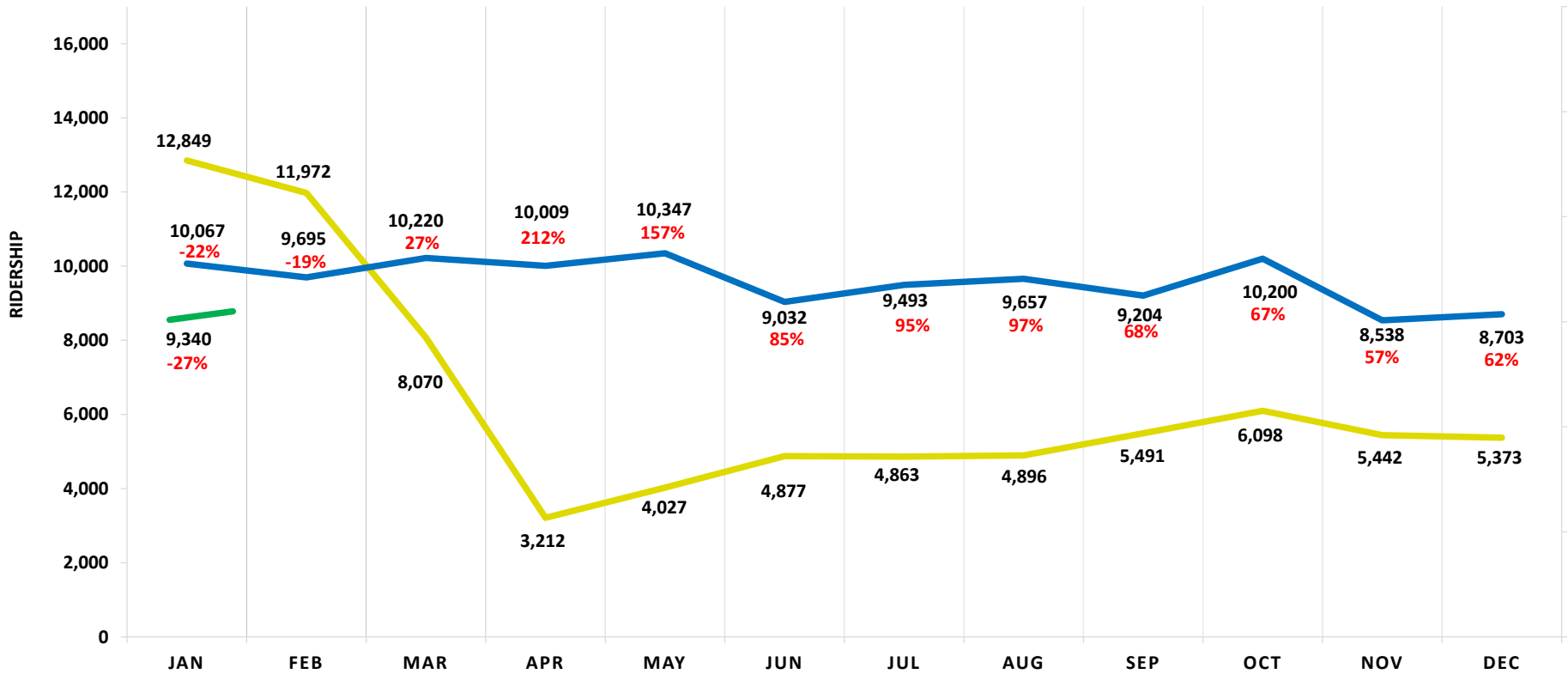
### Fixed Route Ridership COVID-19 Recovery



The COVID-19 pandemic caused a major national and global disruption with closures of businesses, schools and entertainment venues due to the implementation of national and statewide public health policies. Variances are in red close to their corresponding ridership number. 2024 and 2025 are referring to the baseline of 2020. CY 2020 will remain on the chart since it is the baseline needed to compare ridership recovery for CY 2024 & CY 2025. CY 2021/2022/2023 have been removed to reflect the two (2) most recent years in recovery.

## Paratransit Ridership COVID-19 Recovery

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



The COVID-19 pandemic caused a major national and global disruption with closures of businesses, schools and entertainment venues due to the implementation of national and statewide public health policies. Variances are in red close to their corresponding ridership number. 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: March 26, 2025

**APPROVE**

TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of SunDial Operational Notes for January 2025

Summary:

The attached report summarizes SunDial's operation for the month of January 2025. This report identifies that for the month of January, 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 January was 93.2%.

Fiscal-year-to-date, SunDial has maintained an on-time performance of 90.2%. Total vehicle miles for January 2025 decreased by 2,203 compared to January 2024. Total trips for the month of January were 8,824. When compared to January 2024, this is a decrease of 759 trips or 7.9%.

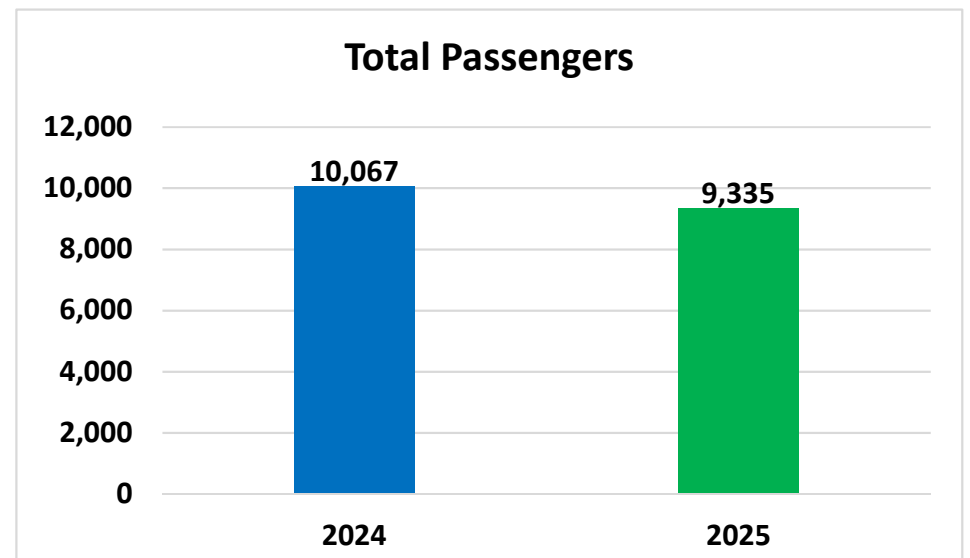
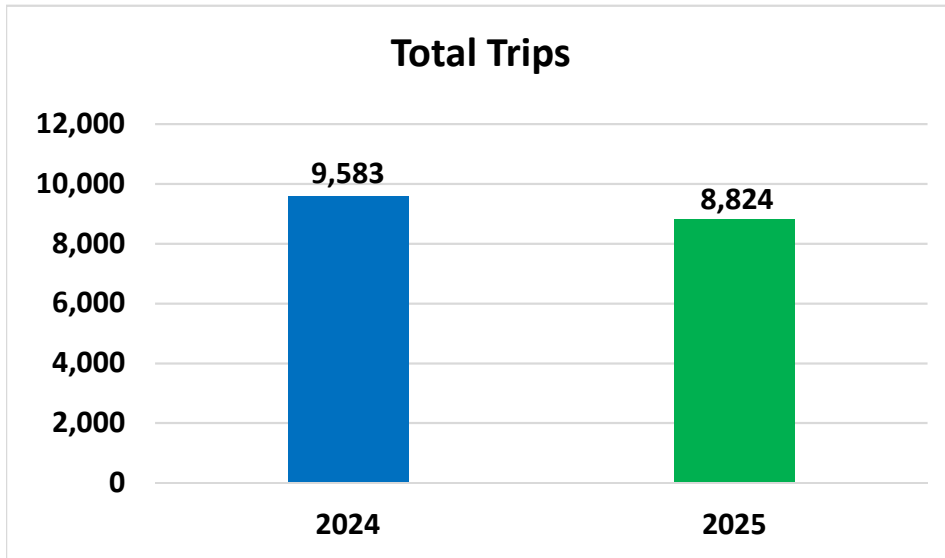
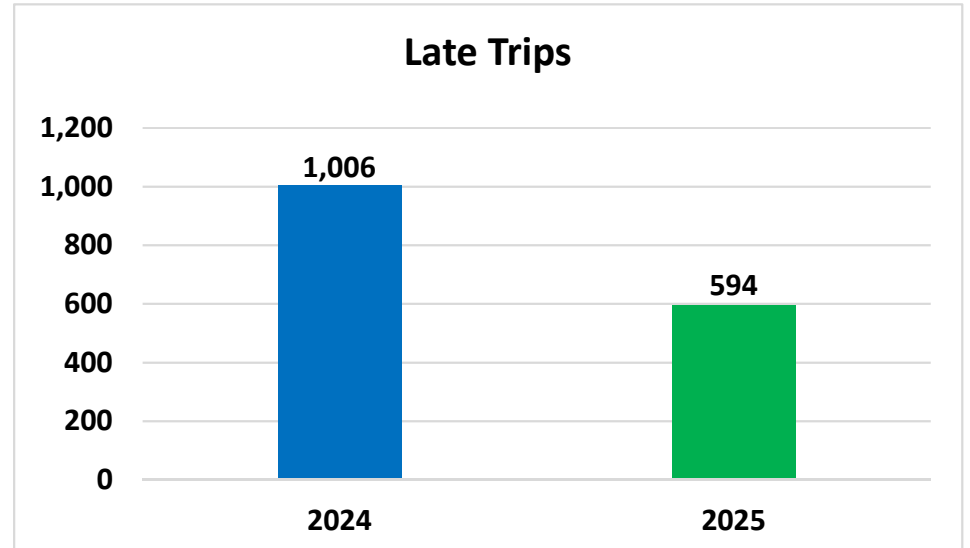
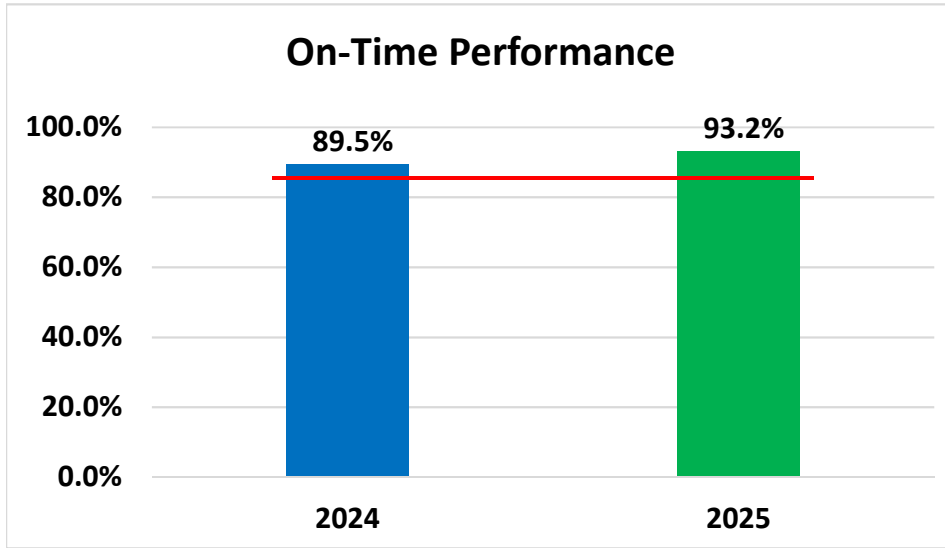
The total number of passengers for the month of January 2025 was 9,335, which indicates a decrease of 732 passengers or 7.2% when compared to January 2024. Mobility device boardings for January 2025 decreased by 118 or 9% when compared to January 2024. During this month, the field supervisors conducted a total of 77 onboard inspections and 86 safety evaluations, which included pre-trip inspections and trailing evaluations. The supervisors have exceeded their monthly on-board evaluations goal of 60 by 17, indicating an increase of 22% when compared to January 2024. Similarly, they have also exceeded their safety evaluations goal of 60 by 26, indicating an increase of 23% when compared to January 2024.

Recommendation:

Approve.

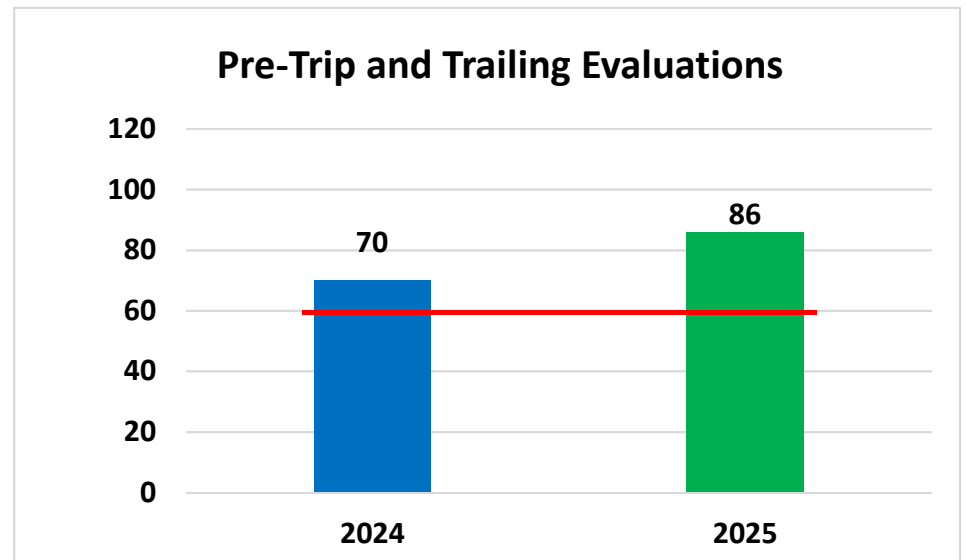
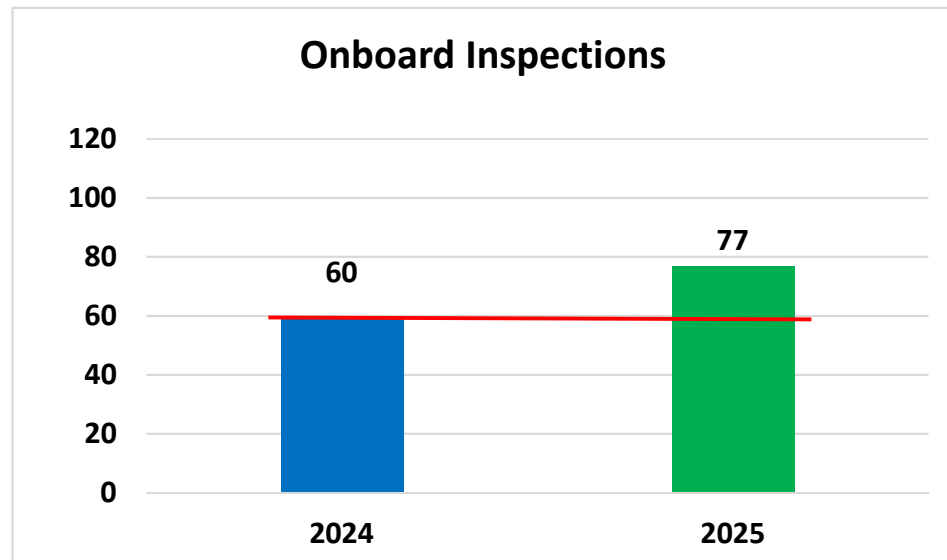
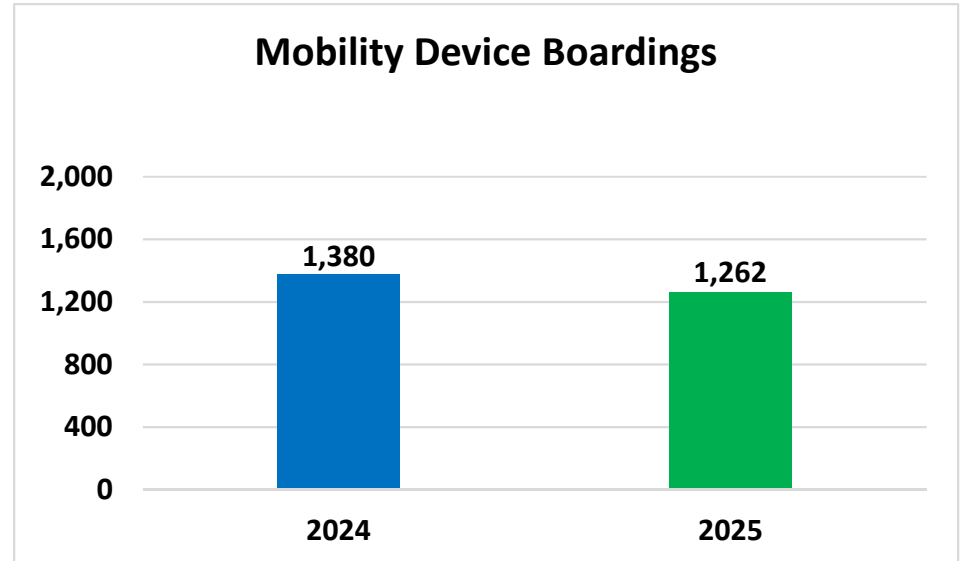
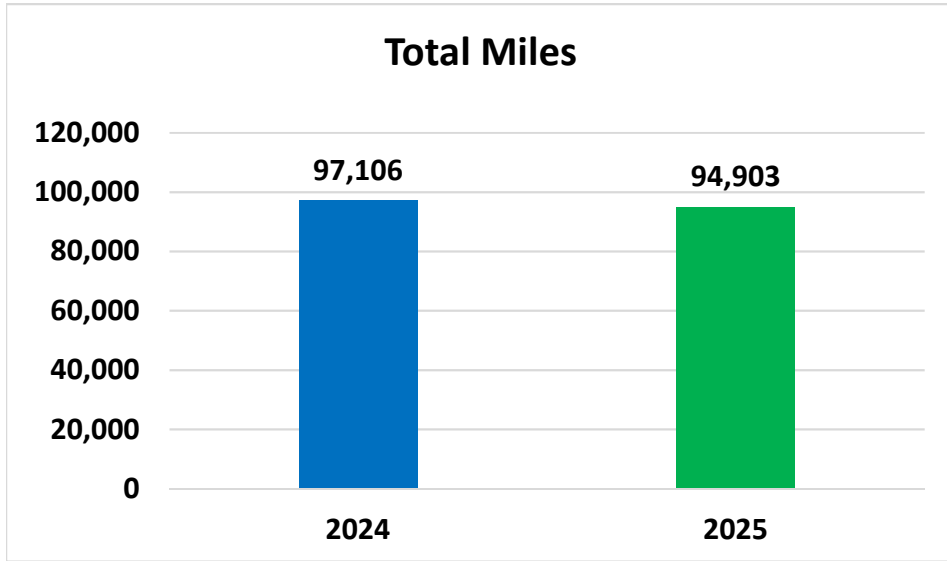
# Paratransit Operational Charts

## January 2024 vs. January 2025



# Paratransit Operational Charts

## January 2024 vs. January 2025



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

DATE: March 26, 2025 **APPROVE**

TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of Metrics for January 2025

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

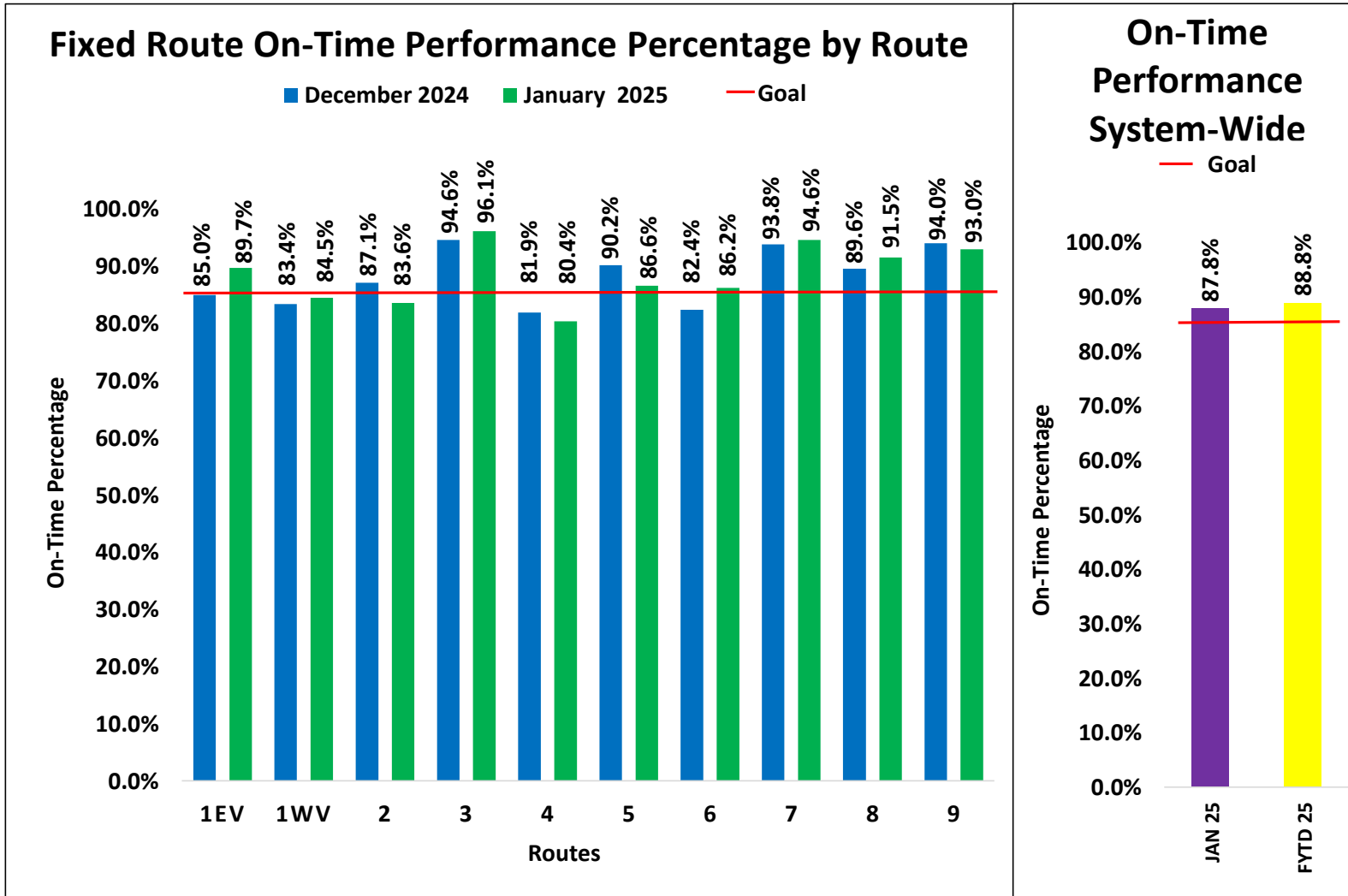
- Systemwide, SunRide had its second strongest month in January with 2,195 trips by 2,351 passengers, representing a 16% increase in ridership when compared to January 2024.
- Indio had its strongest month to date with 518 trips by 545 passengers, an increase of 53% in ridership when compared to January 2024.
- Palm Springs also had its strongest month in January with 312 trips by 339 passengers, an increase of 72% over January 2024.
- Mecca/North Shore was up 22% in January with 119 trips by 145 passengers when compared to January 2024. Noteworthy is that 64% of the ridership was during the time SunRide supplements for Fixed Route (10-2).
- Palm Desert had its second strongest month in January with 716 trips by 771 passengers, an increase of 25% ridership when compared to January 2024.

### Fixed Route

- Fixed route's on-time performance had an increase of 0.6% from December 2024 at 87.2% to January 2025 at 87.8%. For January, the agency exceeded the service standard goal of 85%.
  - Route 1WV did not meet its service standard goal for January due to traffic, construction and operator error, such as, leaving early from the Palm Canyon and Baristo timepoint in Palm Springs, which management have taken corrective actions.
  - Routes 2 and 4 did not meet their service standard goal for January due to road work on the Vista Chino at Sunrise, inclement weather on Gene Autry, which caused detours and road closures.
- Late departures decreased by 0.8% in January 2025 compared to the previous month.
- Early departures increased by 0.3% in January 2025 compared to the previous month.
- For the month of January 2025, 20% of SunLine's fixed route operator workforce was absent when compared to January 2024 at 19%.
- For the month of January 2025, workforce was at a total of 132 operators when compared to January 2024 at 145 operators.

### Recommendation:

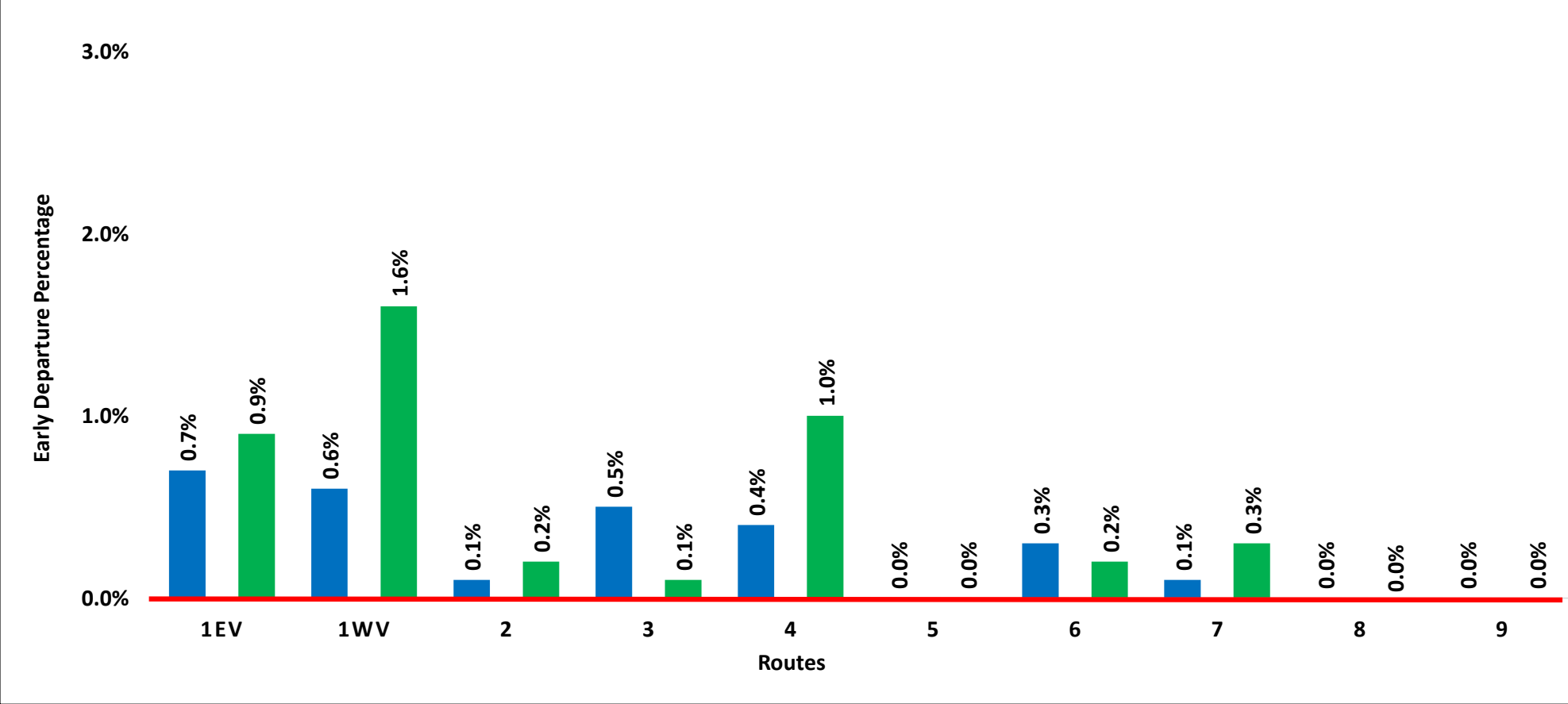
Approve.



On-Time: When a trip departs a timepoint 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 January 2025, the Agency's on-time performance was at 87.8%, when compared to January 2024 at 91.4%. This is a decrease of 3.6%.

### Fixed Route Early Departure Percentage by Route

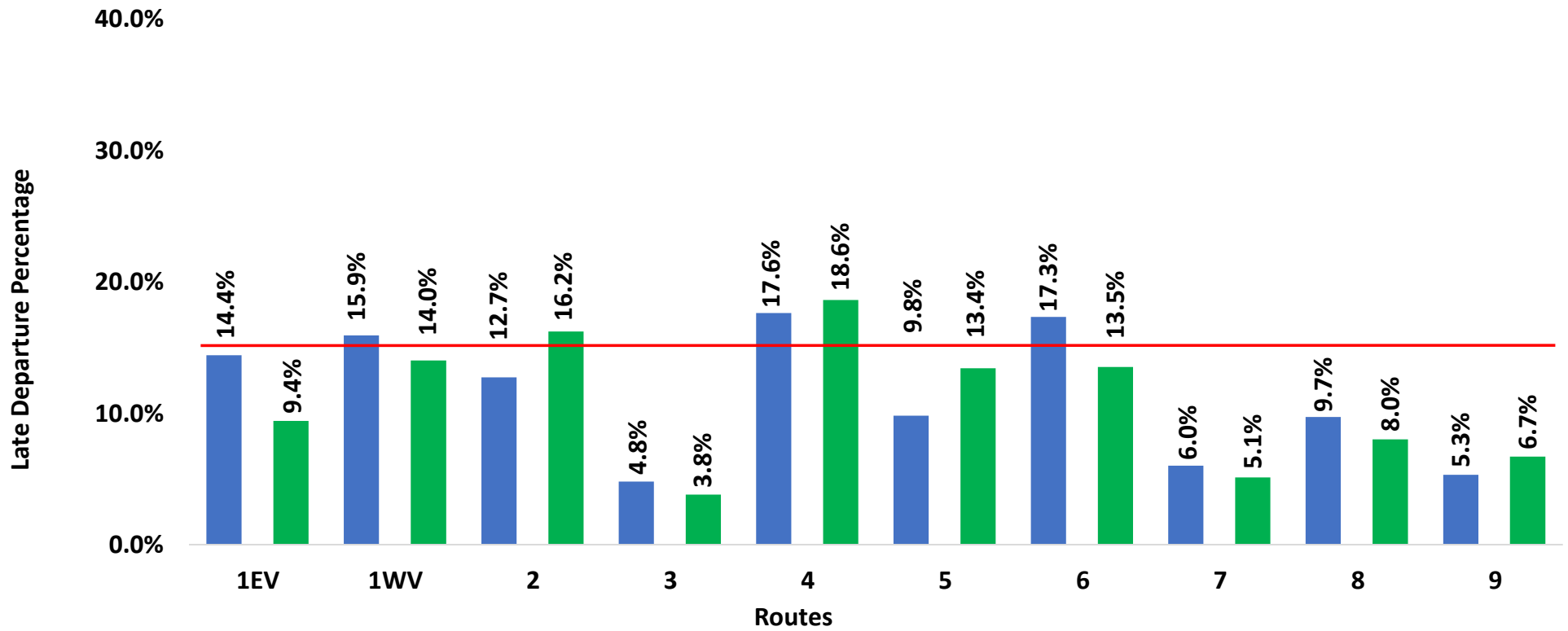
■ December 2024    ■ January 2025



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

## Fixed Route Late Departure Percentage by Route

■ December 2024     
 ■ January 2025     
 — Goal

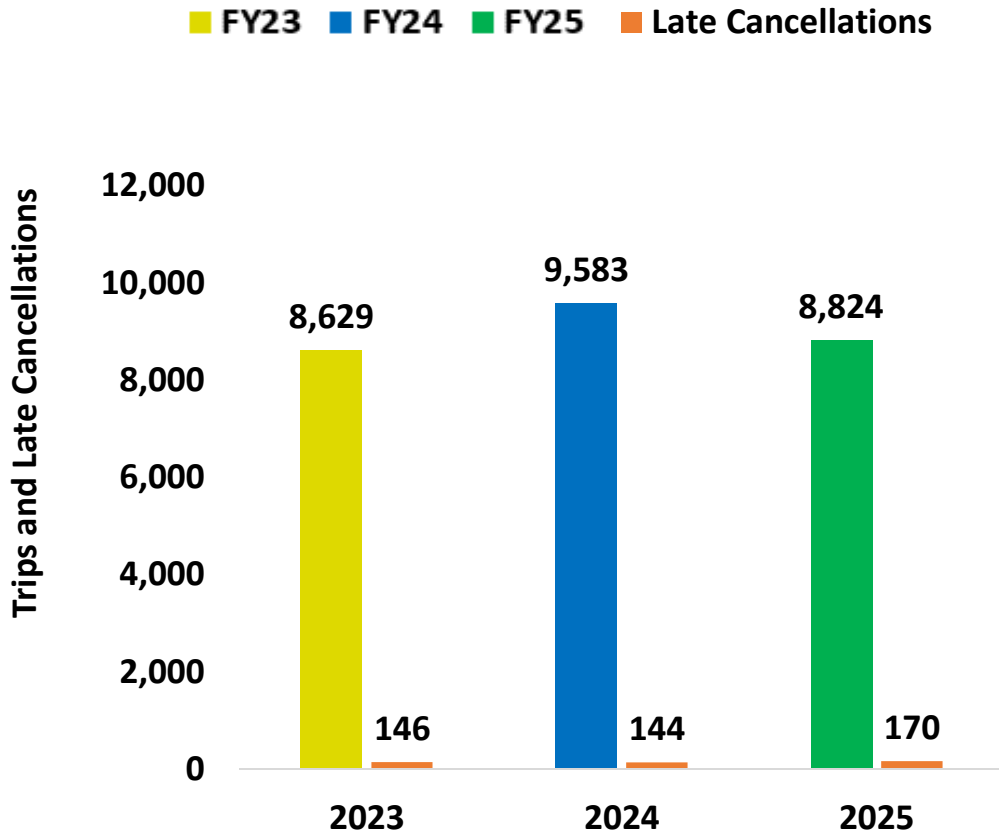


Late Departure: When a bus leaves a timepoint after the scheduled departure time and the route is running late with a departure greater than five (5) minutes.

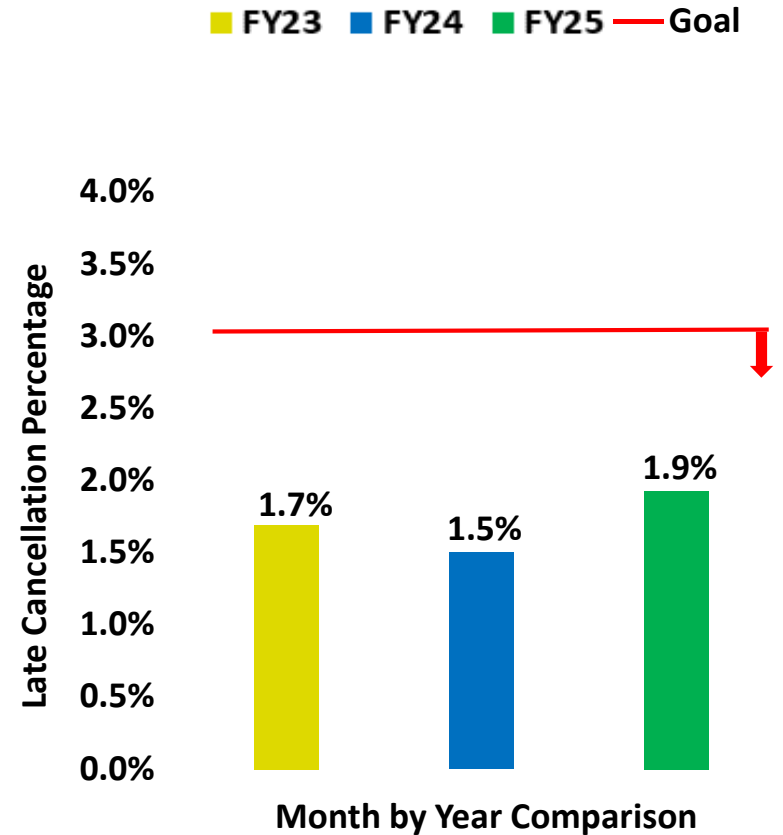
Goal: To ensure late departures remain below 15%.



## Paratransit Total Trips vs. Late Cancellations January



## Late Cancellations by Percentage



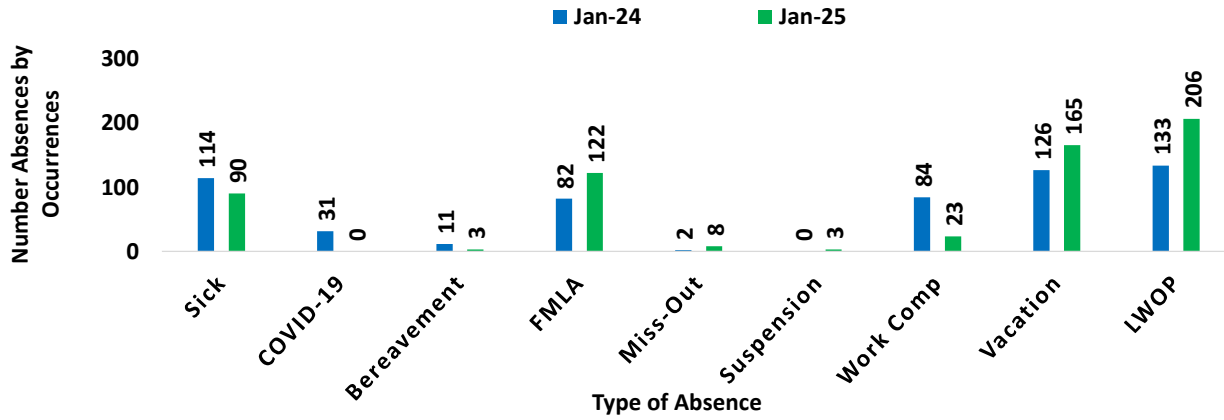
Trip: A one-way trip booked by the rider. A round trip is counted as two (2) trips.

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

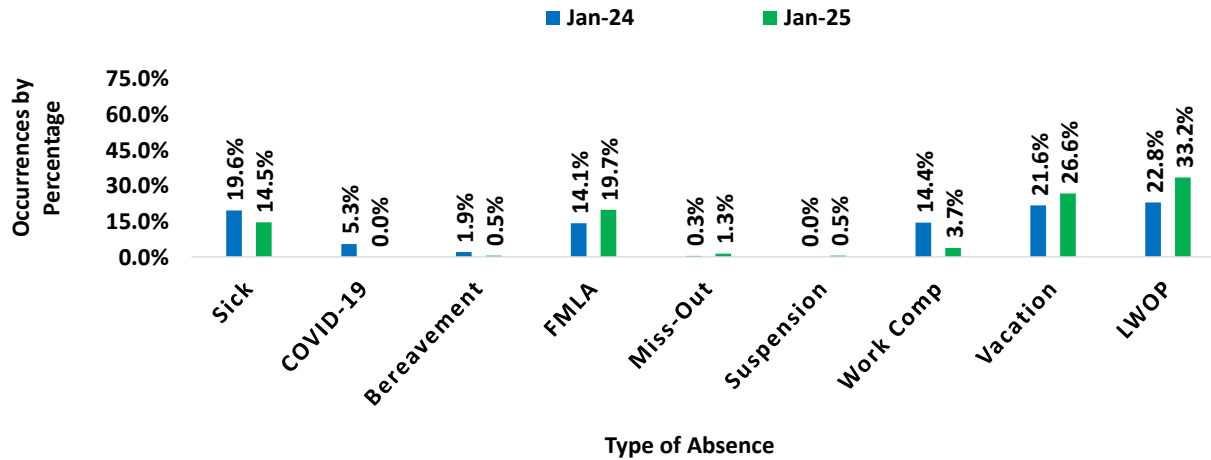
Goal for Late Cancellations: 3% or below.

Total Trips: Total one-way trips completed.

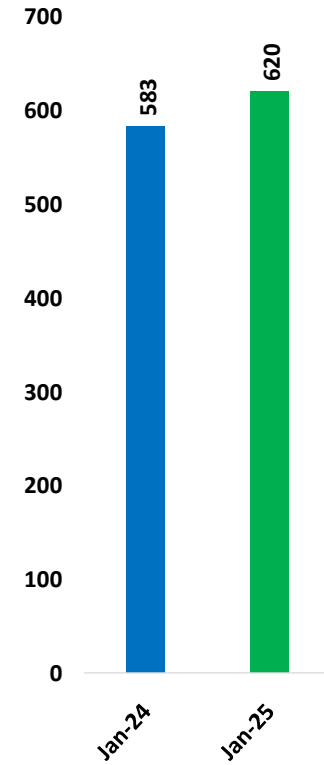
### Fixed Route Operator Absence by Type



### Fixed Route Operator Absence Type by Percentage



### Fixed Route Total Absence Occurrences

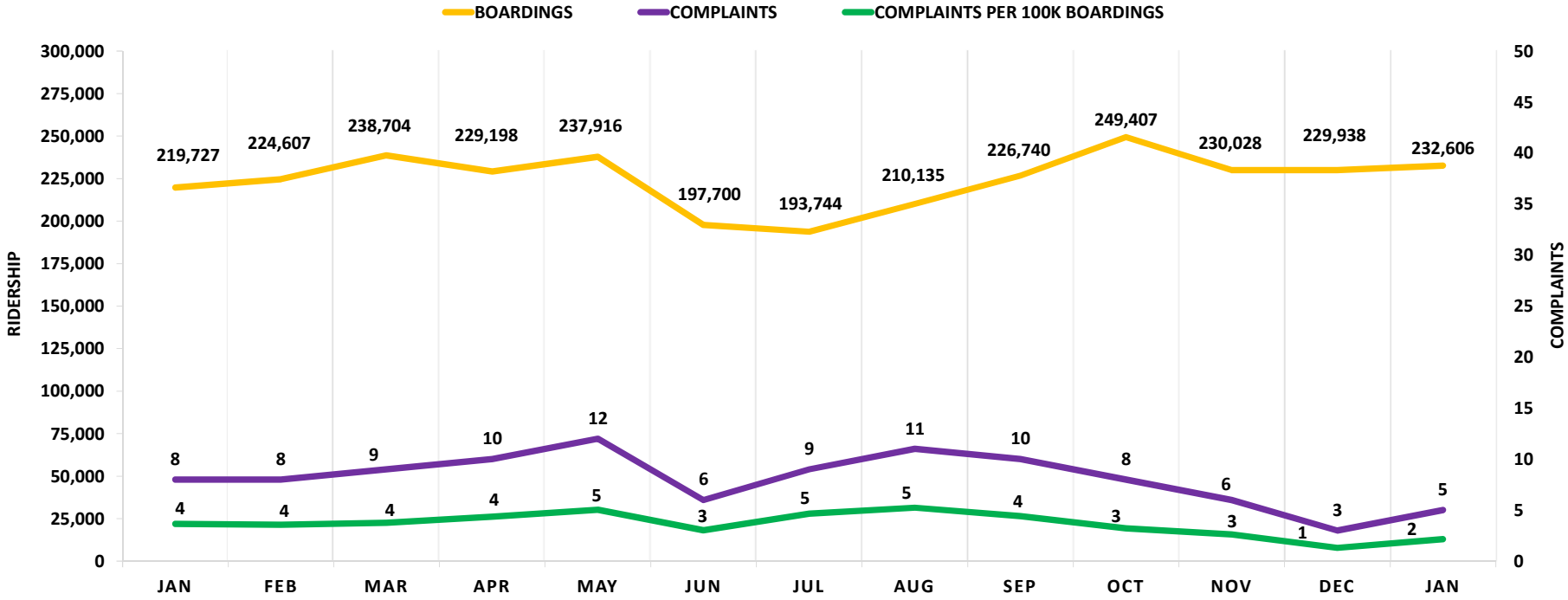


This chart includes unplanned/unscheduled and COVID-19 absences for Fixed Route drivers.

For the month of January 2025, 20% of SunLine's fixed route operator workforce was absent when compared to January 2024 at 19%.

For the month of January 2025, workforce was at a total of 132 operators when compared to January 2024 at 145 operators.

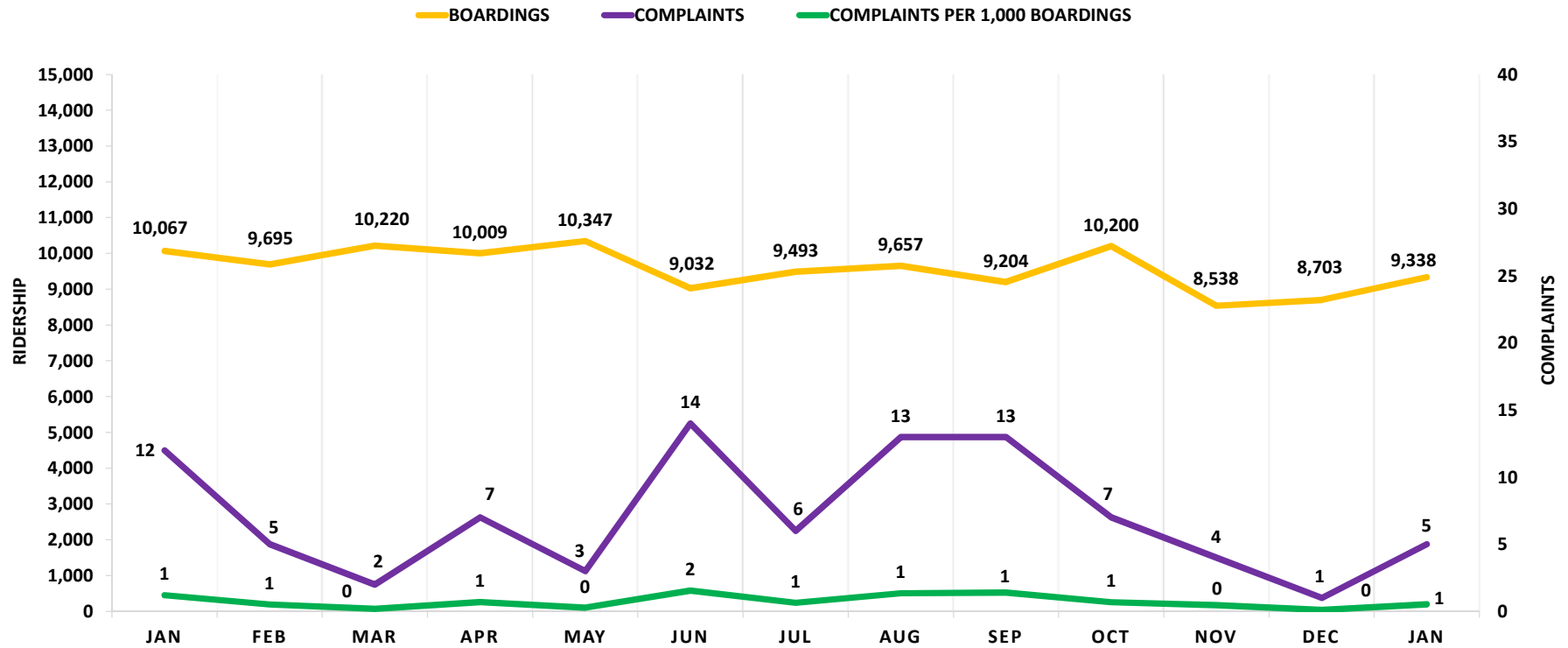
## Fixed Route Customer Complaints January 2024 to January 2025



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

For the month of January, 99.9% of our total boardings did not receive a complaint.

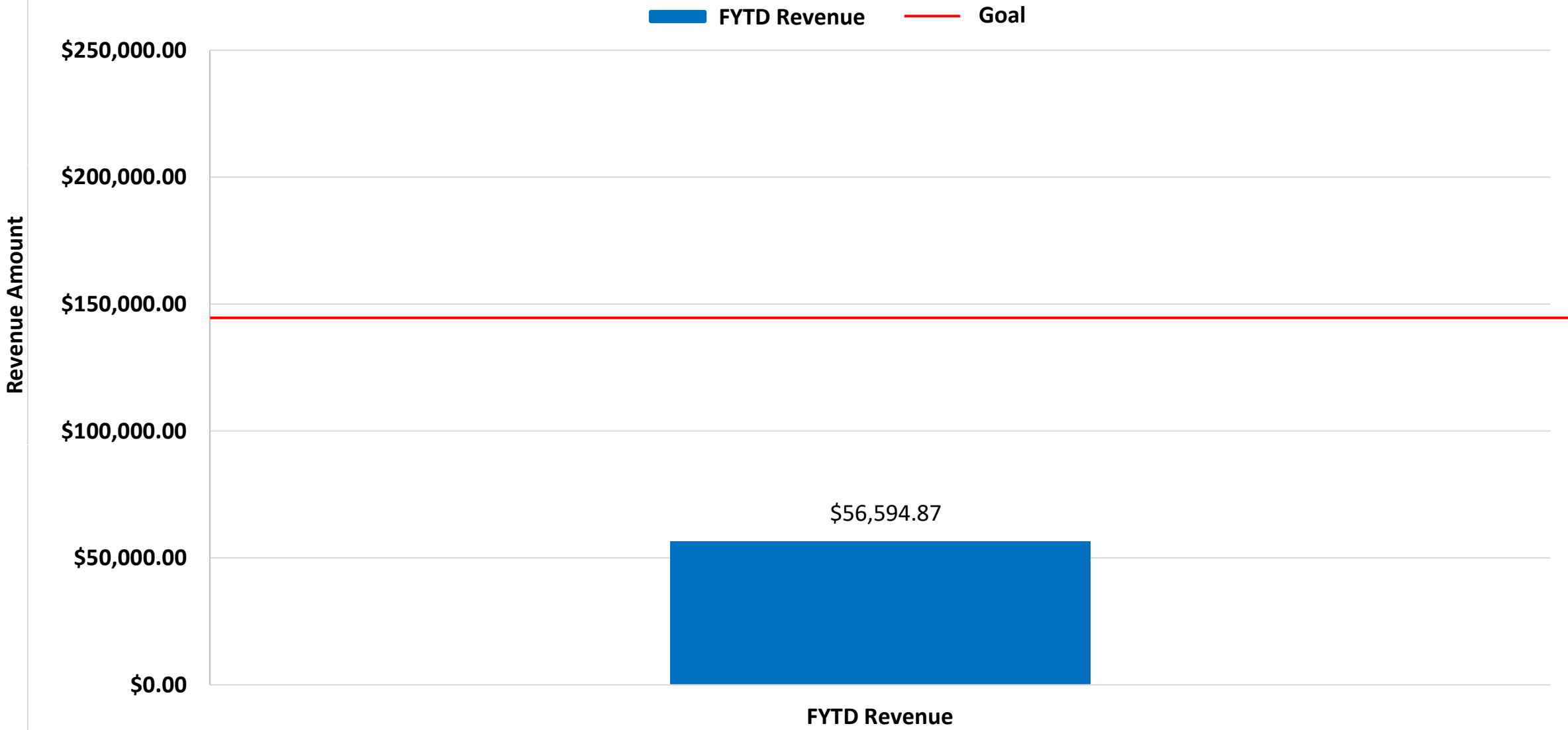
## Paratransit Customer Complaints January 2024 to January 2025



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

For the month of January, 99.95% of our total boardings did not receive a complaint.

# Advertising Revenue FYTD Revenue vs. Yearly Goal January 2025

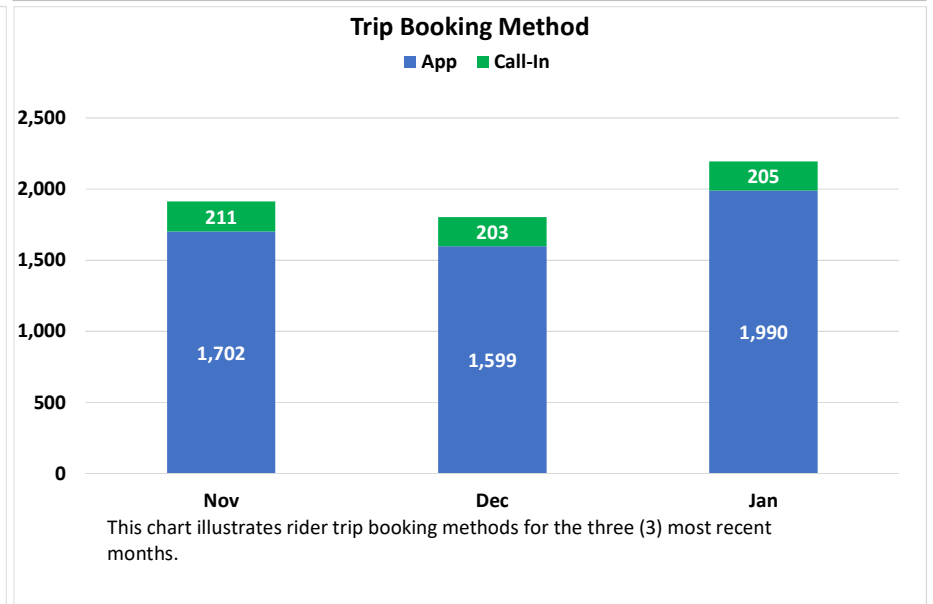
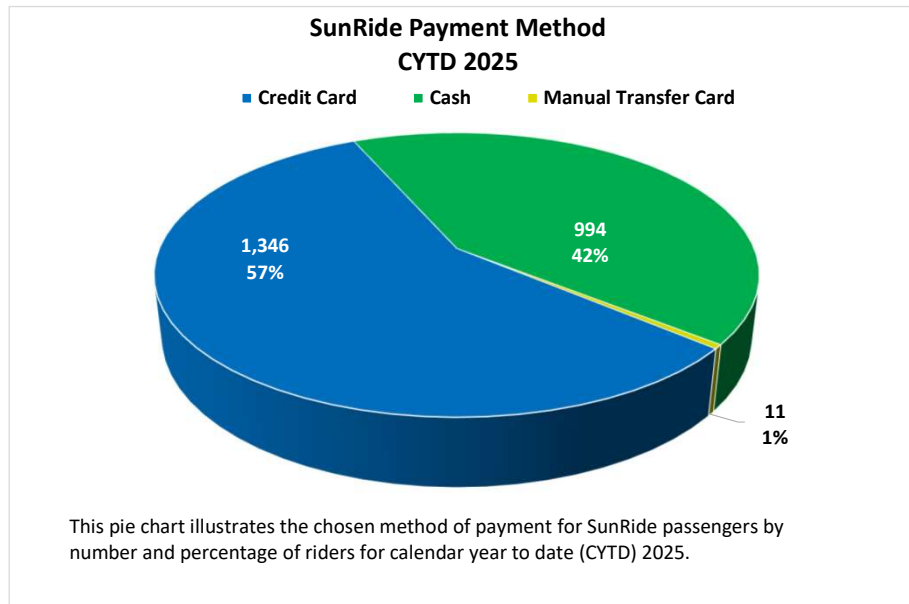
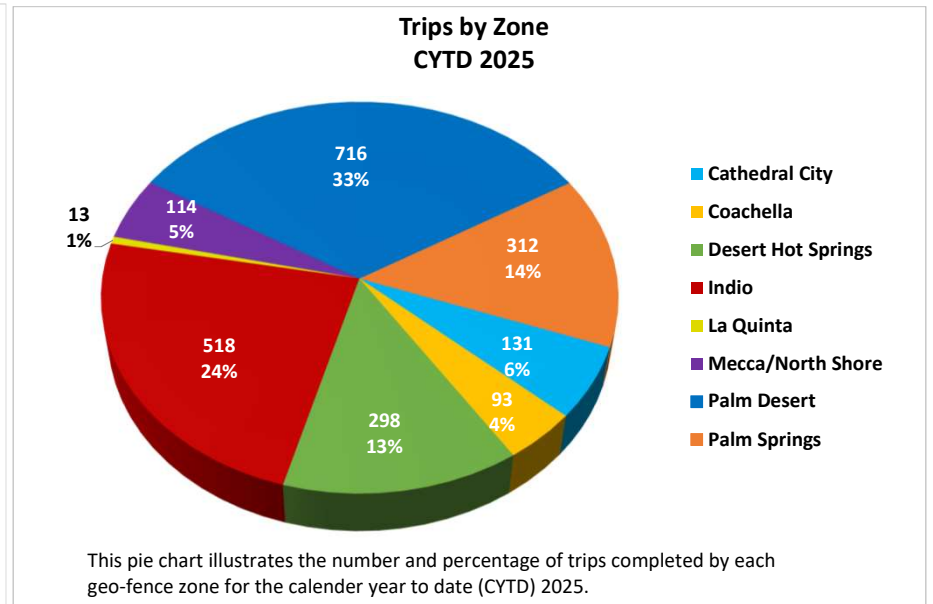
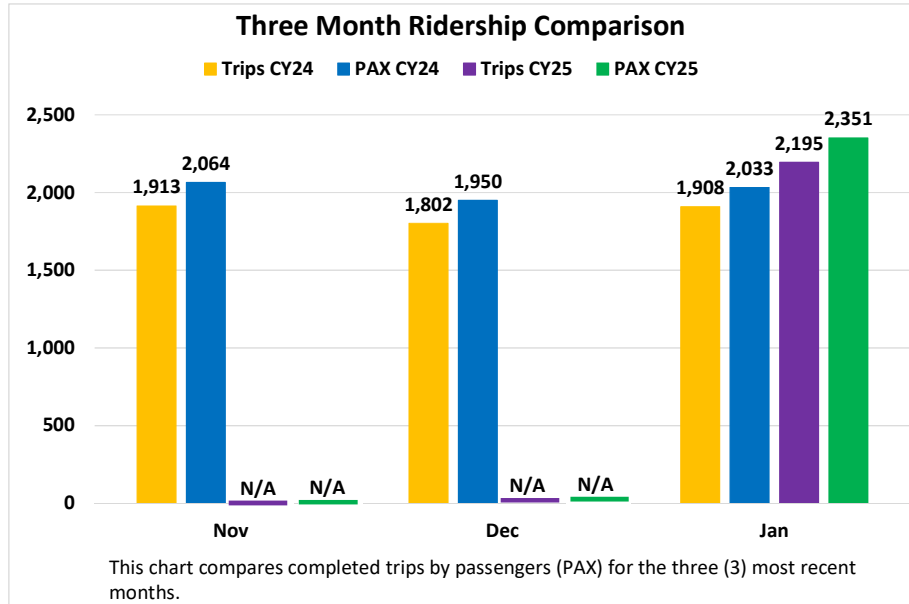


Advertising revenue tracks revenue of invoiced contracts for bus shelter and bus wrap advertising. The graph tracks FYTD revenue versus our yearly goal. The yearly goal for FY25 is \$150,000 (*advertising revenues follow Finance Department reporting from the previous two (2) months*).

## SunRide System-Wide Metrics CYTD 2025

**Total Completed Trips: 2,195**

**Total Number of Passengers: 2,351**

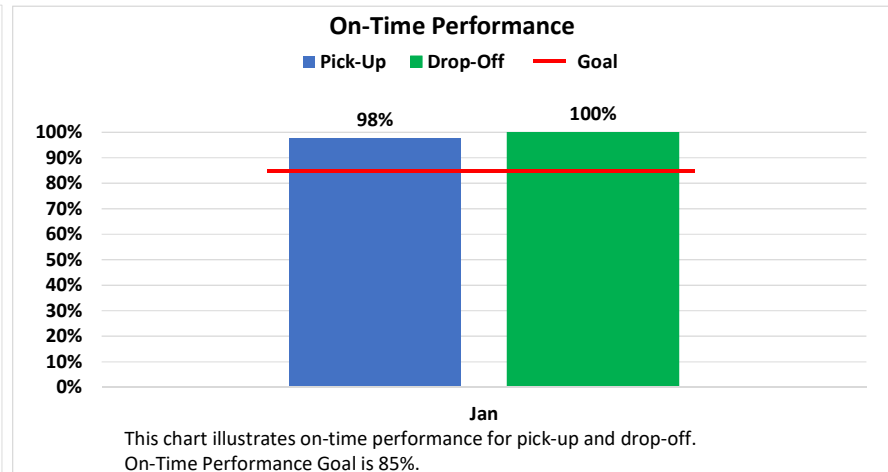
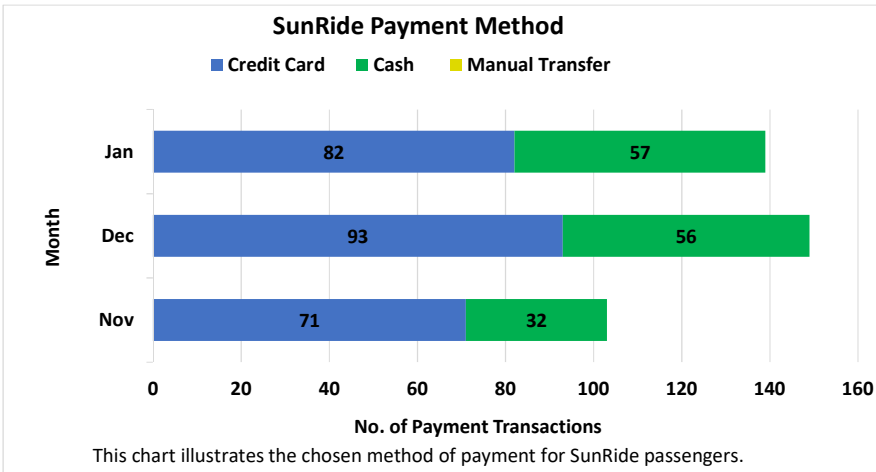
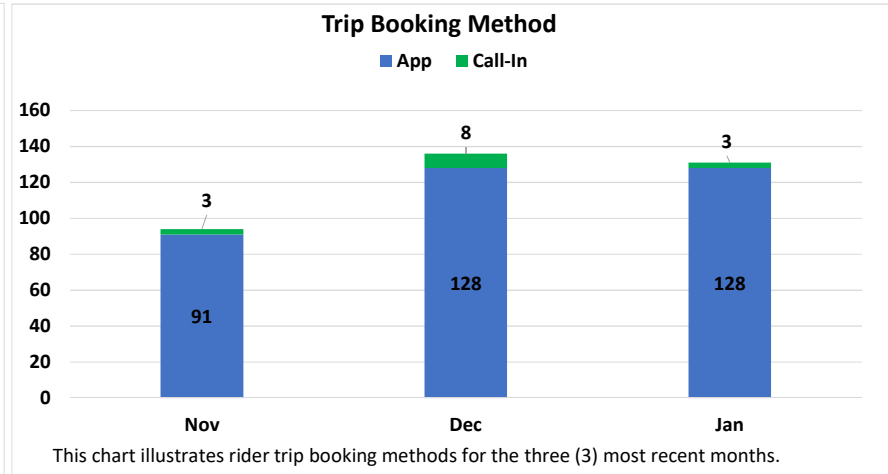
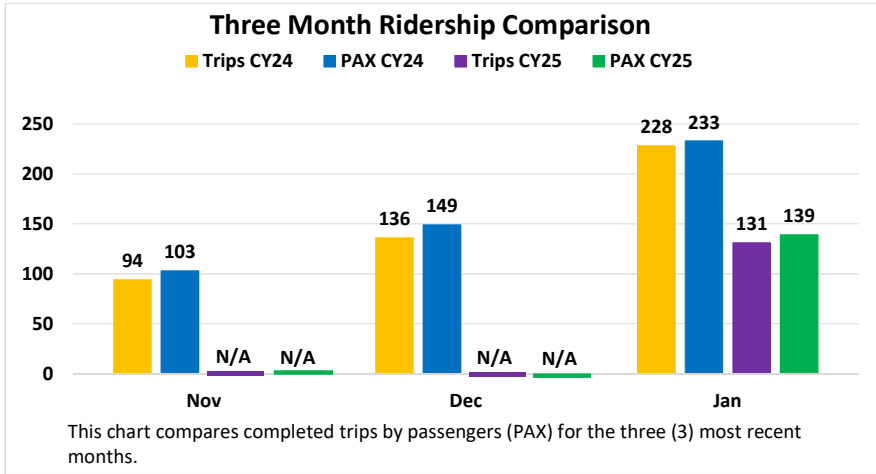


**Percentage of Trips System-wide as Ridesharing: 31%.**  
 [Based on No. of Shared Rides for the month (688) divided by Total Trips Completed (2,351)\*].  
 \* Variance due to rounding

## Cathedral City Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 131**

**Total Number of Passengers: 139**



**Percentage of Trips as Ridesharing: 14%.**  
 [Based on No. of Shared Rides for the month (18) divided by Total Trips Completed (131).]

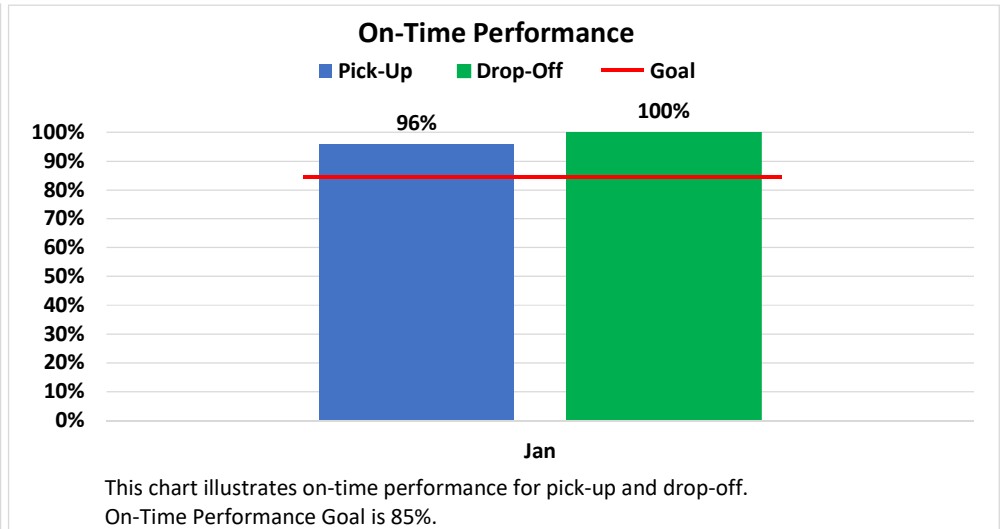
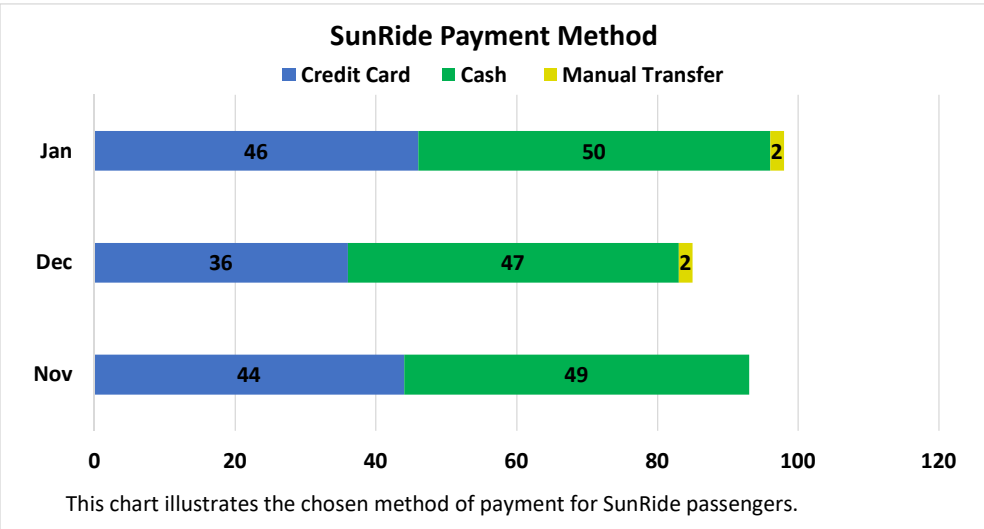
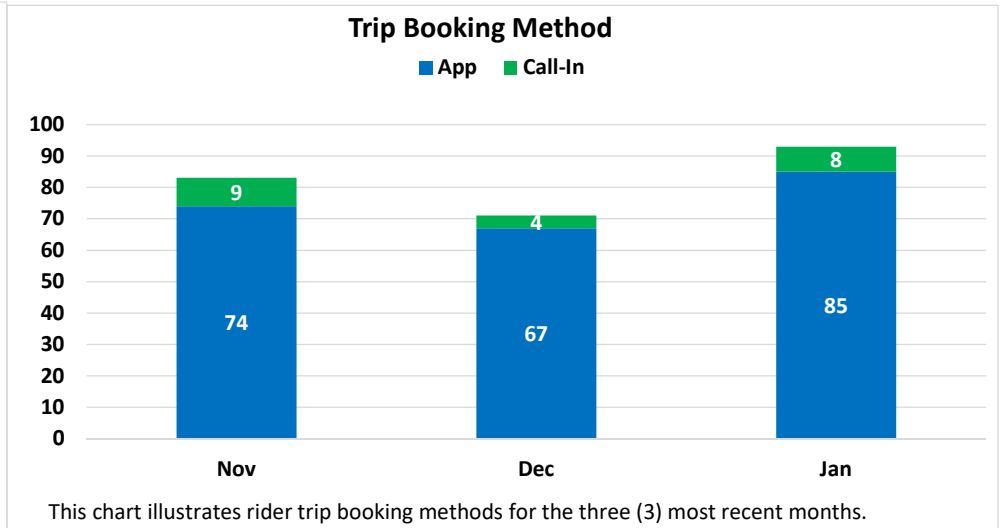
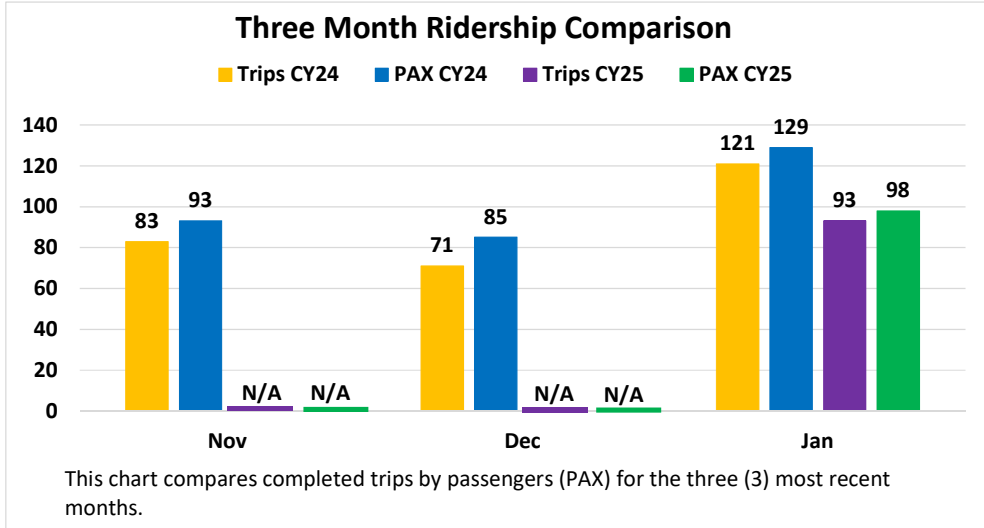
**Customer Satisfaction Rating**  
 Avg. rider trip rating 5.0  
 Goal: 4.5


**EXCEEDS GOAL**

## Coachella Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 93**

**Total Number of Passengers: 98**



 **Combined Zone: Coachella-Indio-LaQuinta**  
**Percentage of Trips as Ridesharing: 25%.**  
 [Based on No. of Shared Rides for the month (155) divided by Total Trips Completed (624).]

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

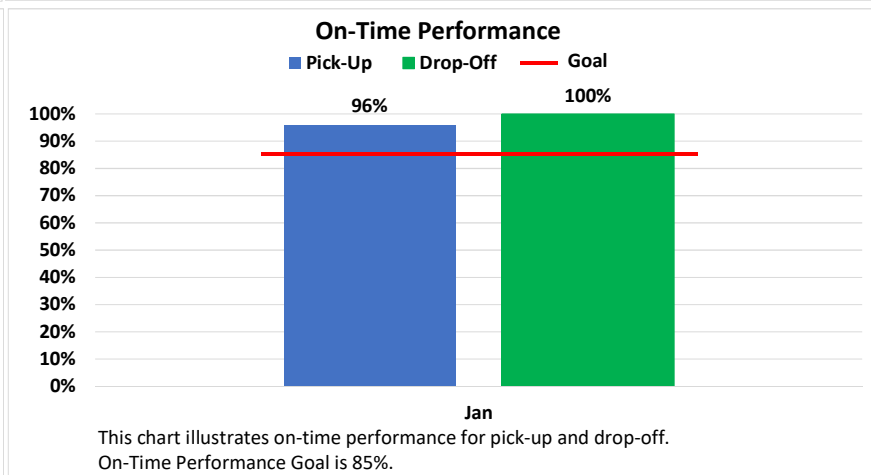
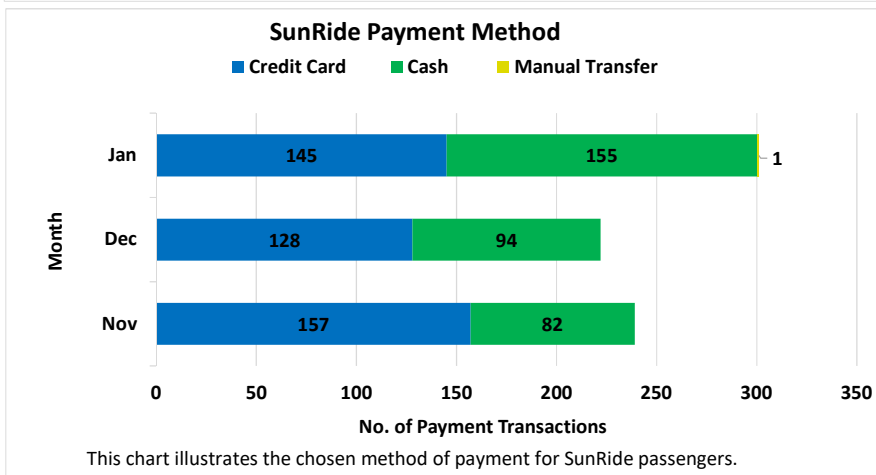
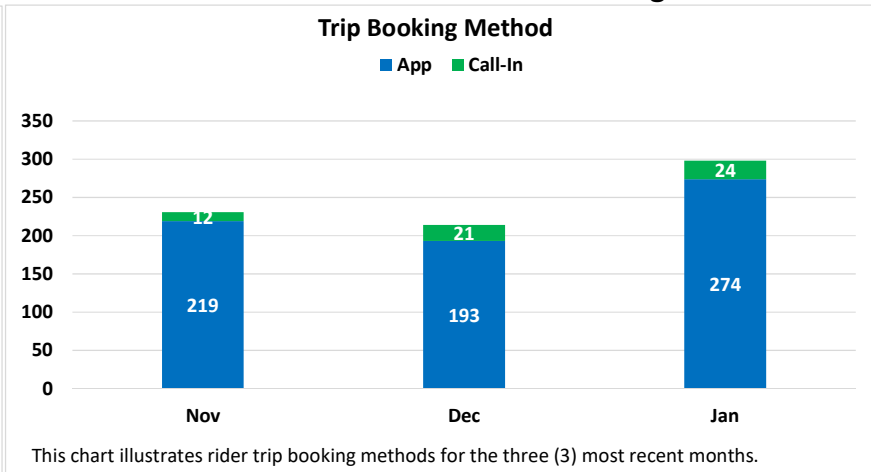
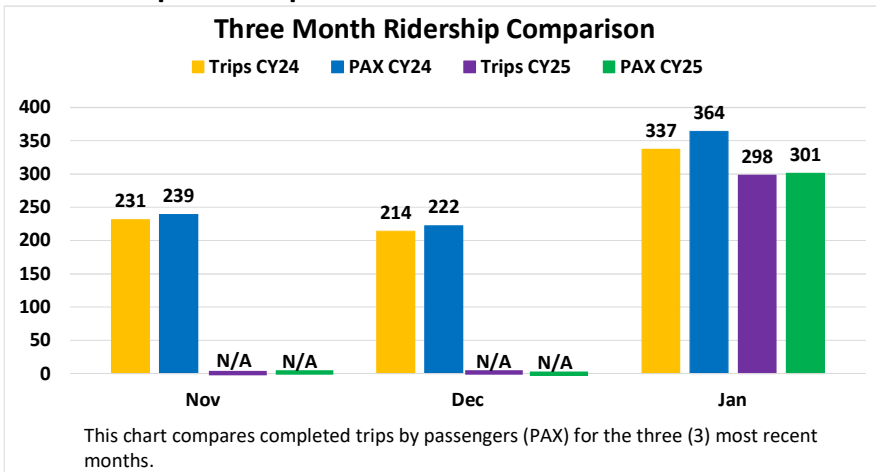
  
**EXCEEDS GOAL!**



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

**Total Completed Trips: 298**

**Total Number of Passengers: 301**



**Percentage of Trips as Ridesharing: 28%**  
 [Based on No. of Shared Rides for the month (83) divided by Total Trips Completed (298).]

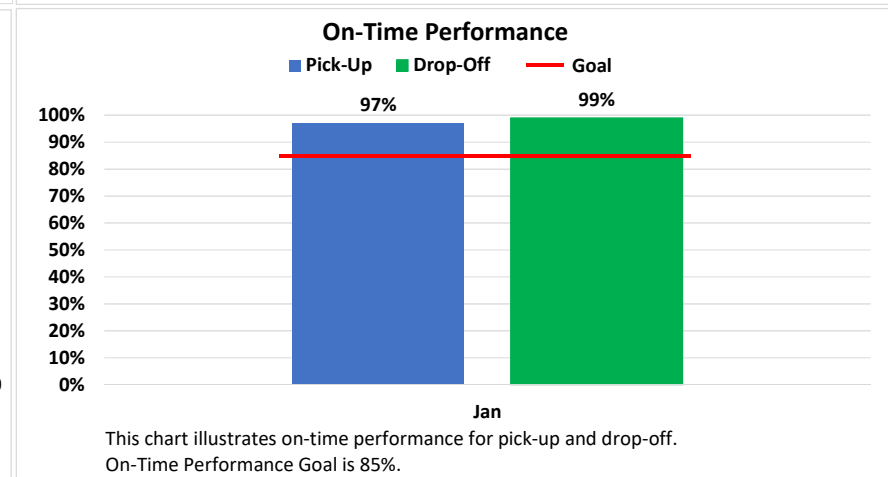
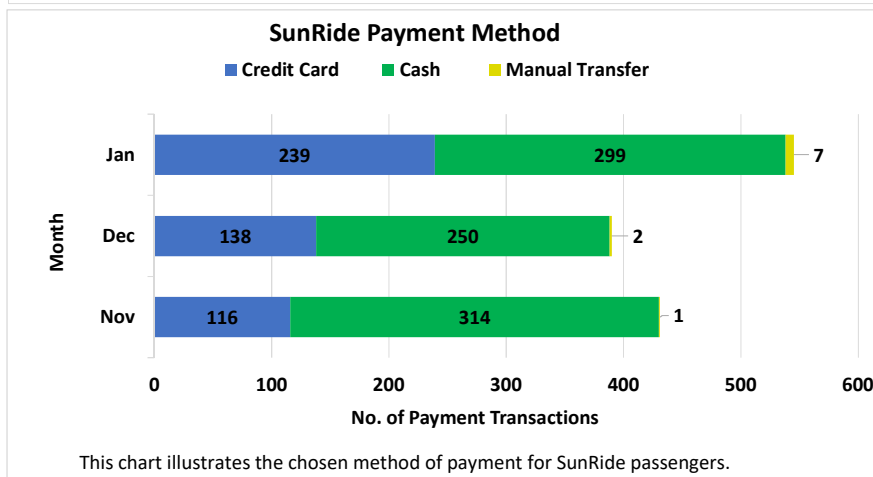
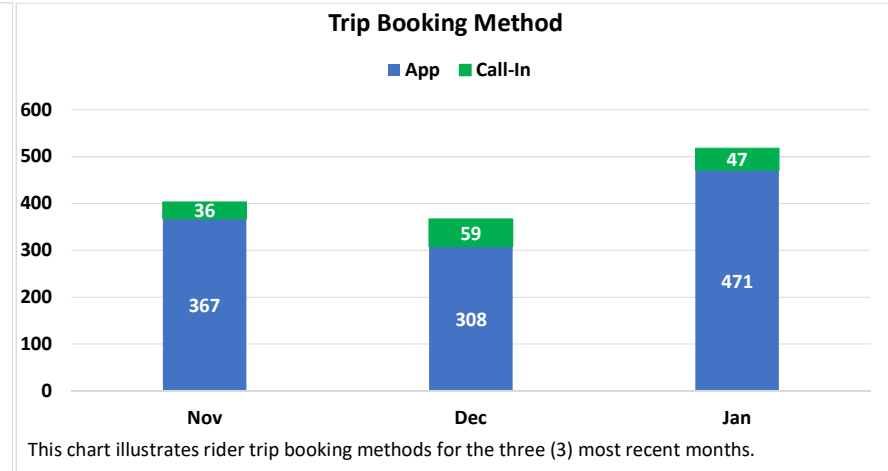
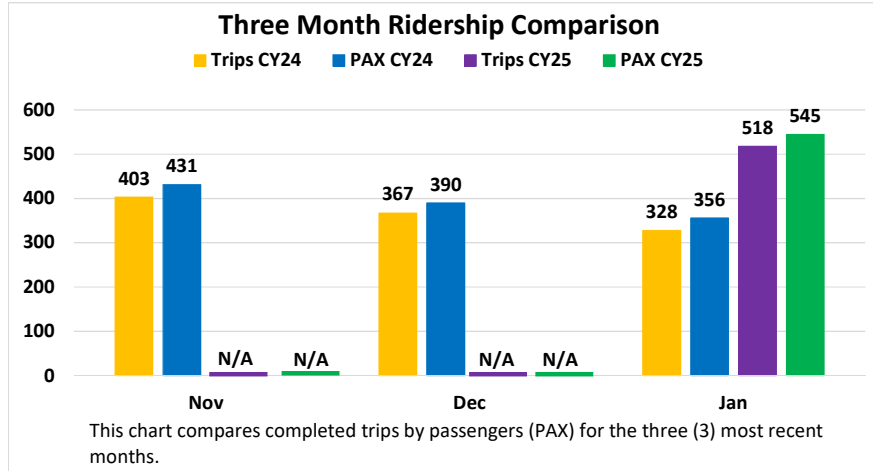
**Customer Satisfaction Rating**  
 Avg. rider trip rating 4.9  
 Goal: 4.5




## Indio Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 518**

**Total Number of Passengers: 545**



 **Combined Zone: Coachella-Indio-LaQuinta**  
**Percentage of Trips as Ridesharing: 25%.**  
 [Based on No. of Shared Rides for the month (155) divided by Total Trips Completed (624).]

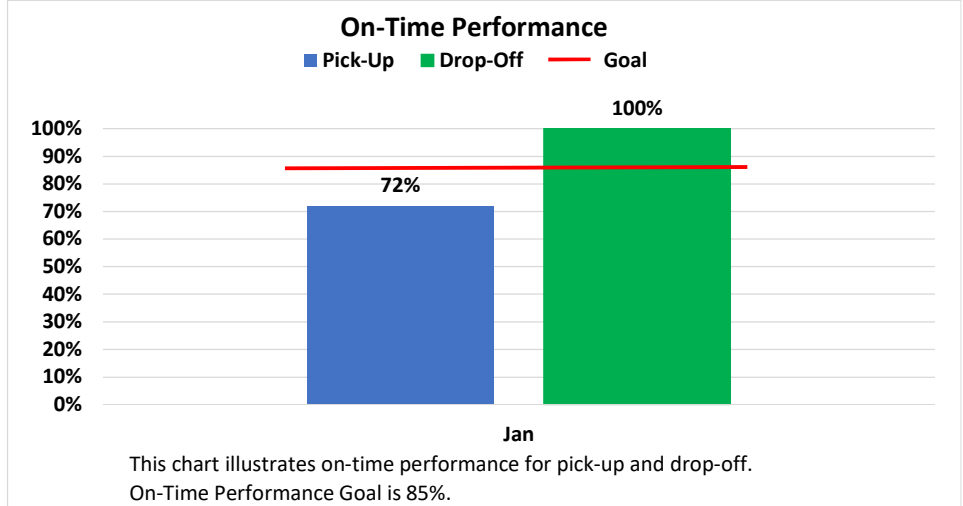
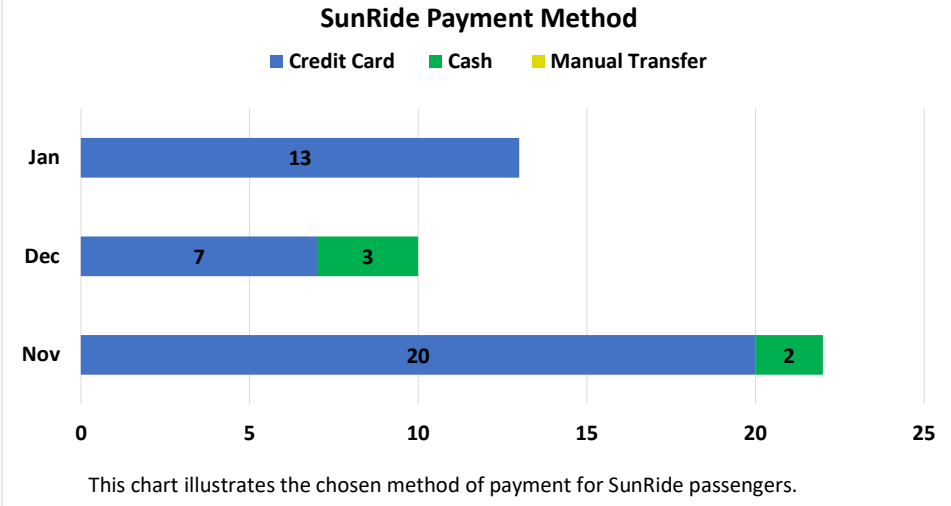
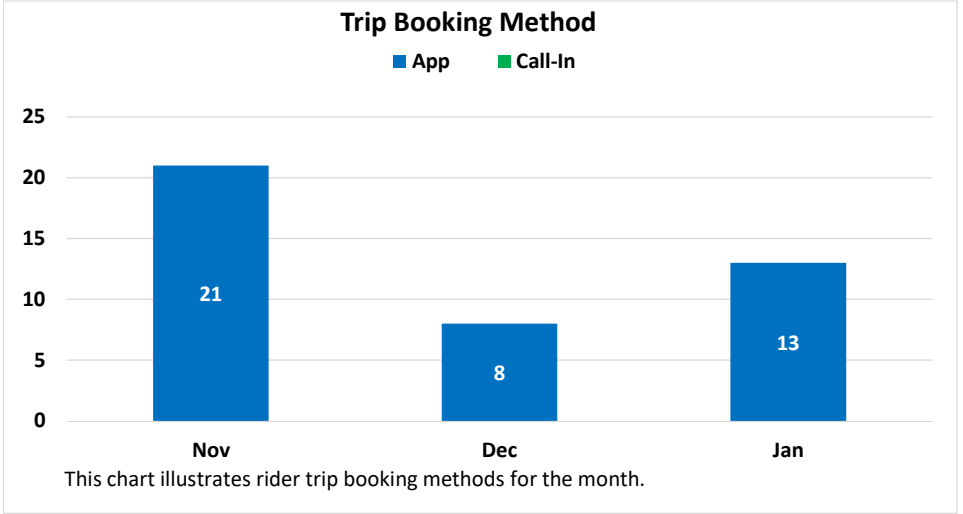
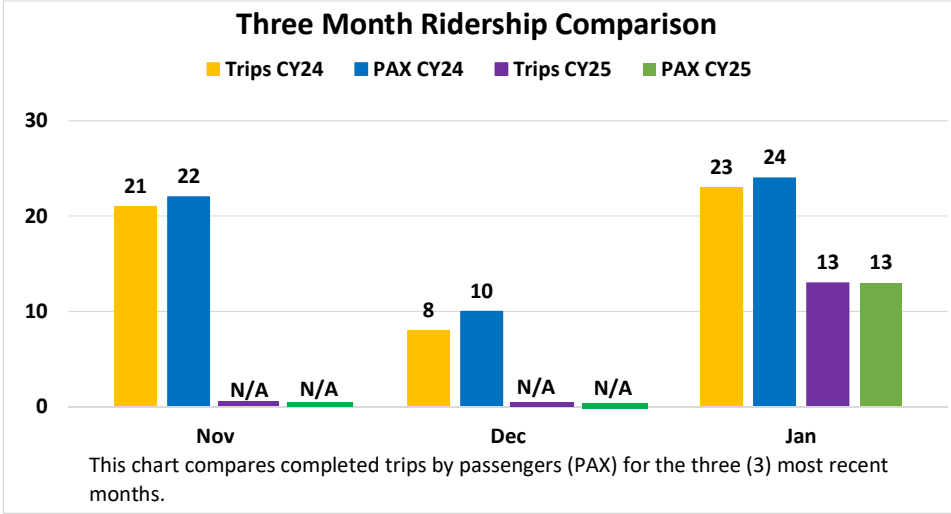
**Customer Satisfaction Rating**  
 Avg. rider trip rating 4.9  
 Goal: 4.5

  
**EXCEEDS GOAL**

## La Quinta Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 13**

**Total Number of Passengers: 13**



**Combined Zone: Coachella-Indio-LaQuinta**  
**Percentage of Trips as Ridesharing: 25%.**  
 [Based on No. of Shared Rides for the month (155) divided by Total Trips Completed (624).]

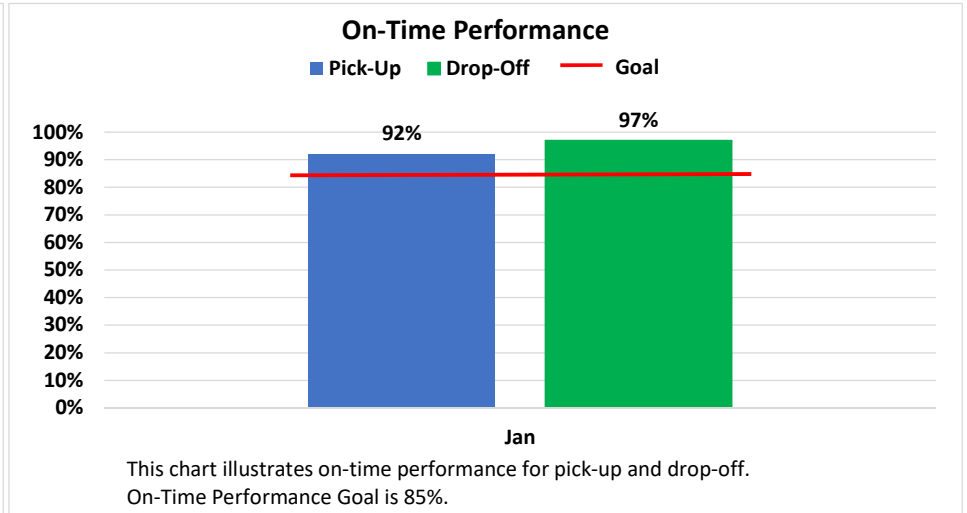
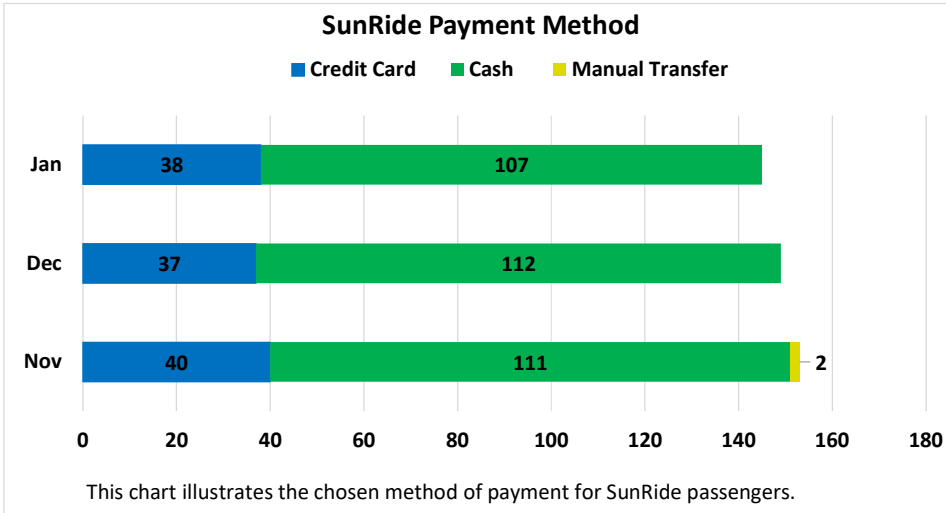
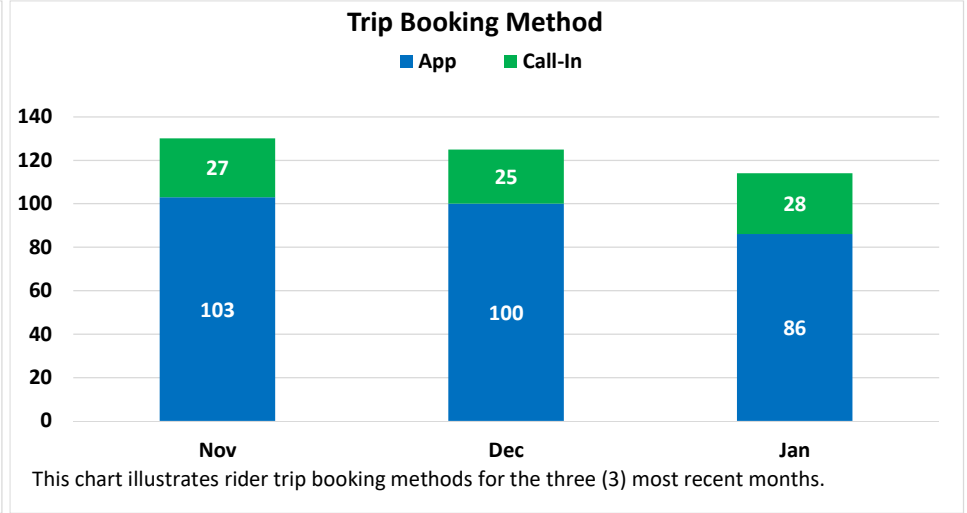
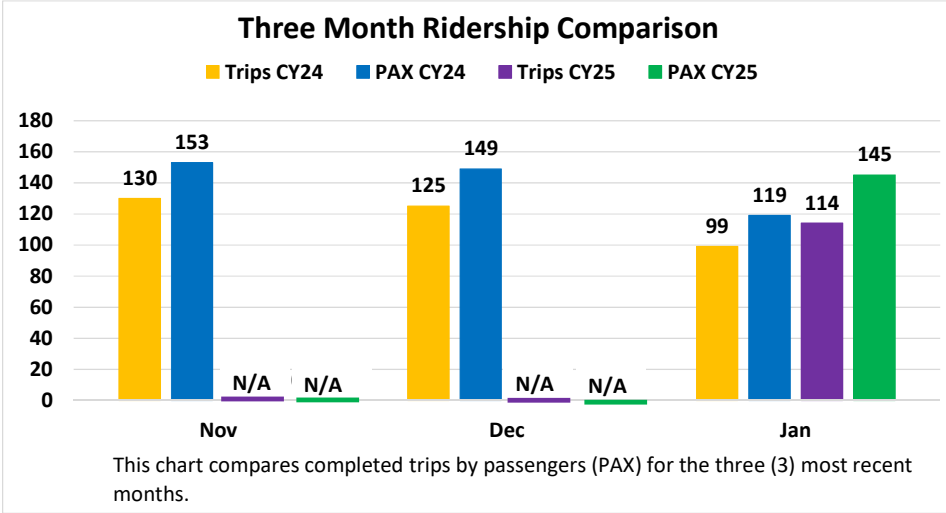
**Customer Satisfaction Rating**  
 Avg. rider trip rating: 5.0  
 Goal: 4.5



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

**Total Completed Trips: 114**

**Total Number of Passengers: 145**



**Percentage of Trips as Ridesharing: Five (5) percent.**  
[Based on No. of Shared Rides for the month (6) divided by Total Trips Completed (114).]

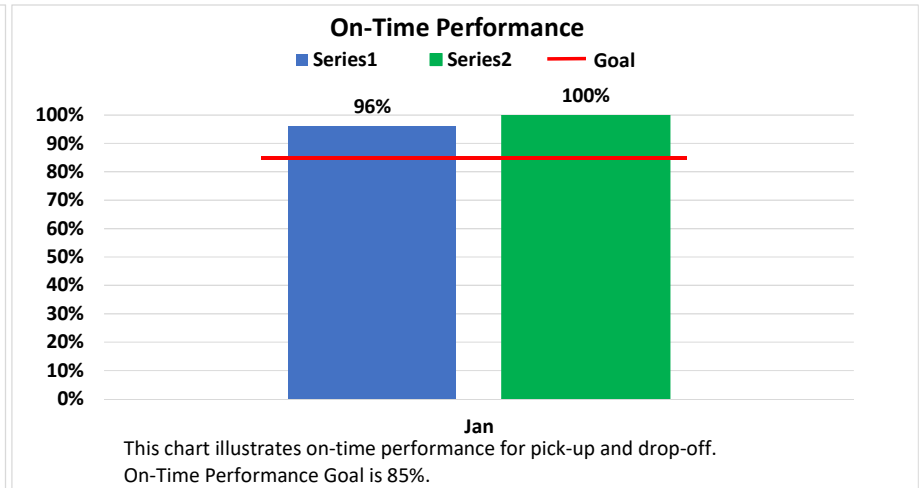
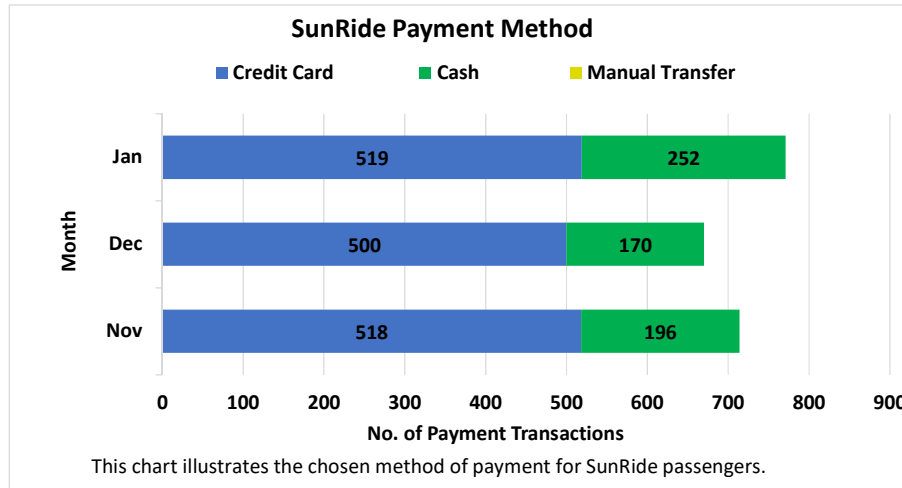
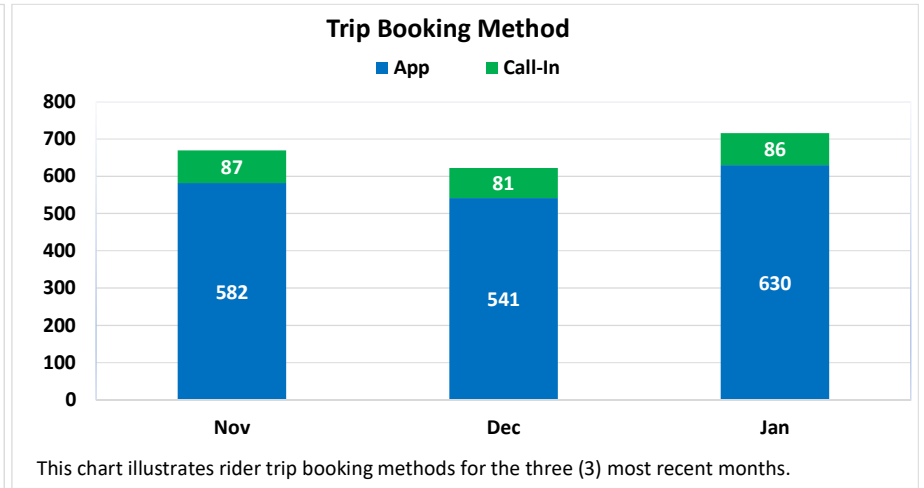
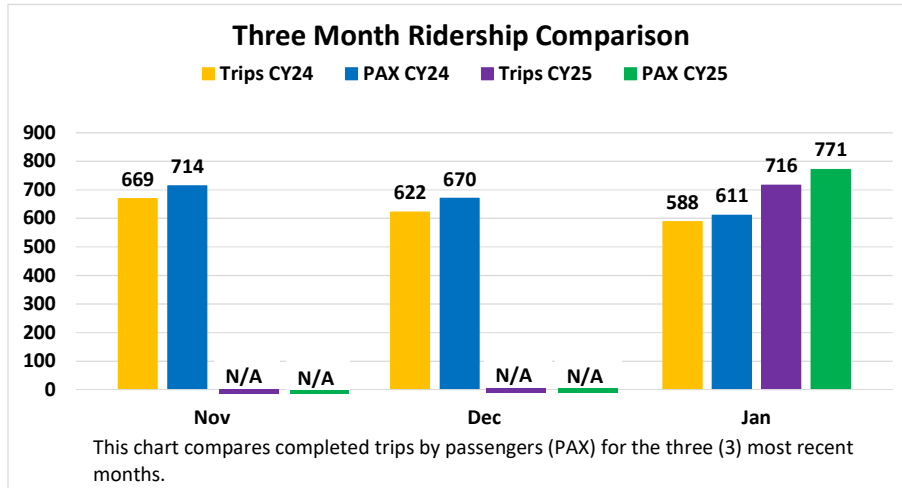
**Customer Satisfaction Rating**  
Avg. rider trip rating: 4.9  
Goal: 4.5



## Palm Desert Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 716**

**Total Number of Passengers: 771**



**Percentage of Trips as Ridesharing: 43%.**  
 [Based on No. of Shared Rides for the month (306) divided by Total Trips Completed (716).]

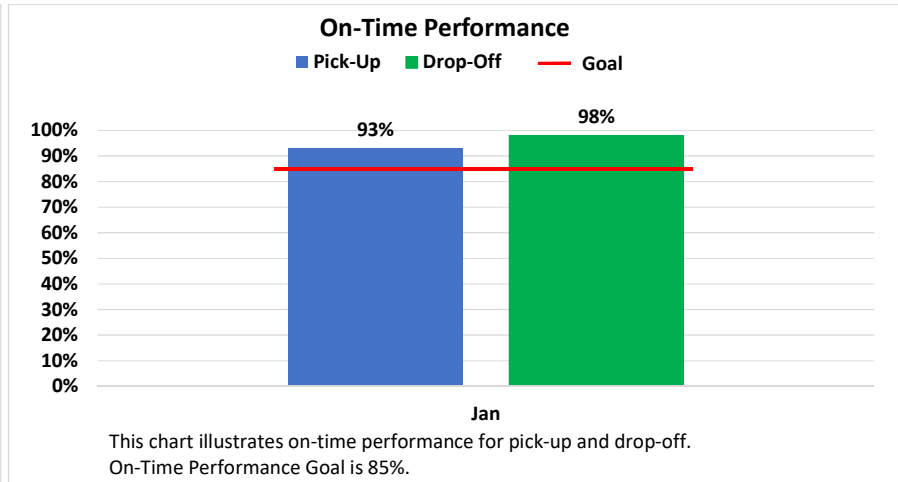
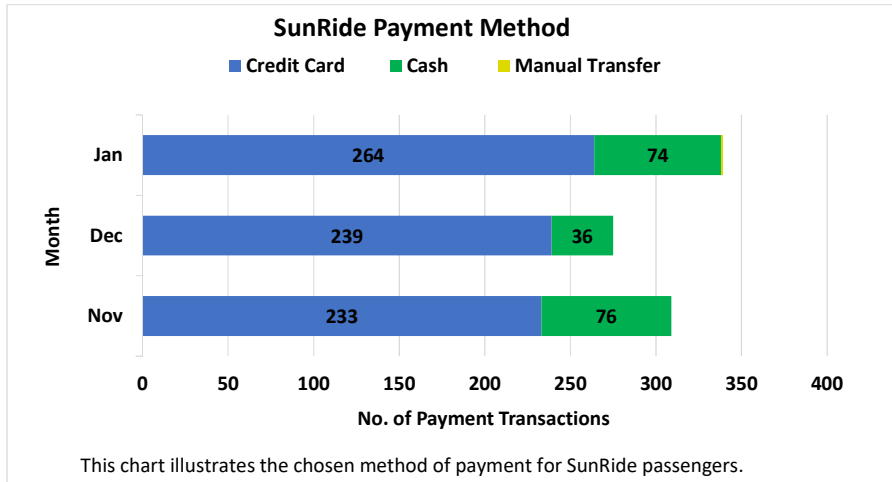
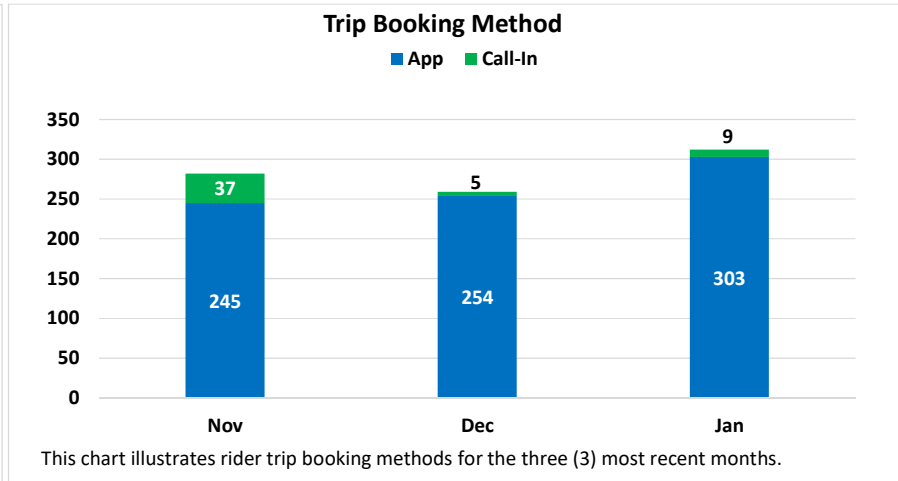
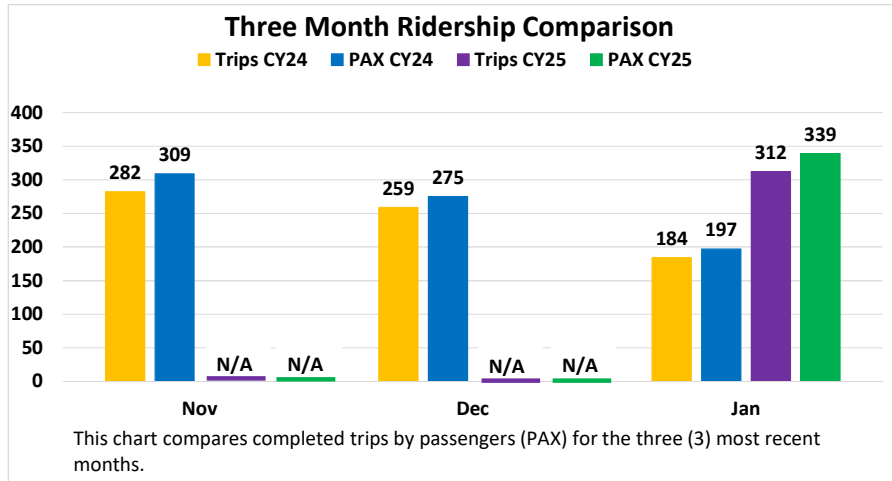
**Customer Satisfaction Rating**  
 Avg. rider trip rating: 4.9  
 Goal: 4.5



## Palm Springs Geo-Fence Metrics CYTD 2025

**Total Completed Trips: 312**

**Total Number of Passengers: 339**

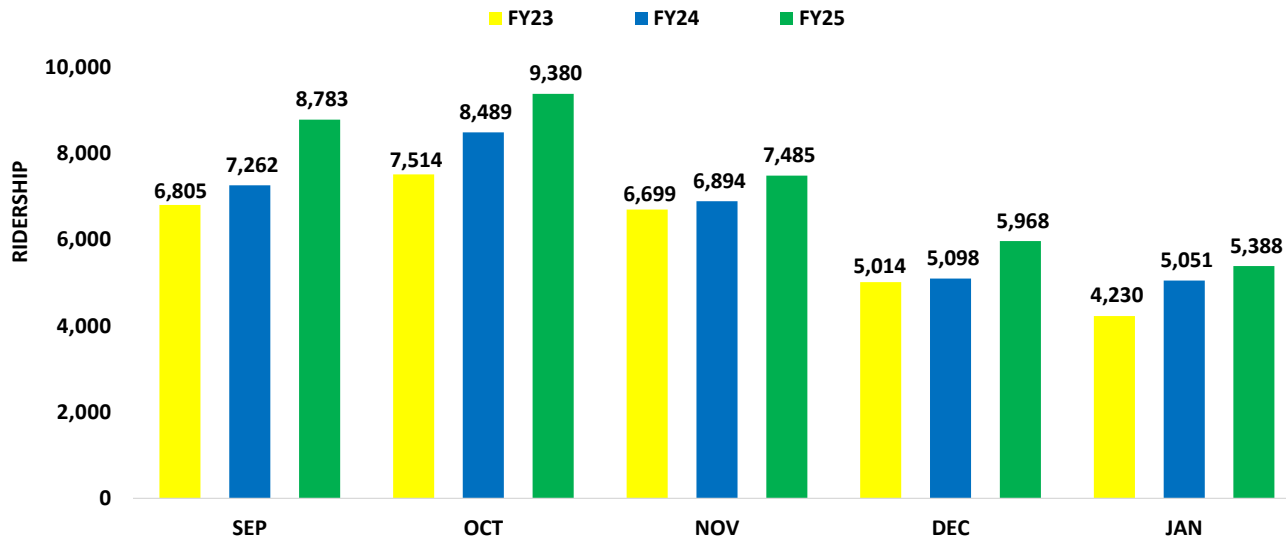


**Percentage of Trips as Ridesharing: 38%.**  
 [Based on No. of Shared Rides for the month (120) divided by Total Trips Completed (312).]

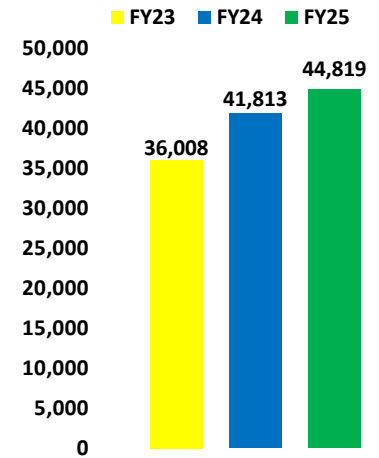
**Customer Satisfaction Rating**  
 Avg. rider trip rating 5.0  
 Goal: 4.5



### Haul Pass COD Ridership - January 2025



### COD Fixed Route Ridership Year to Date



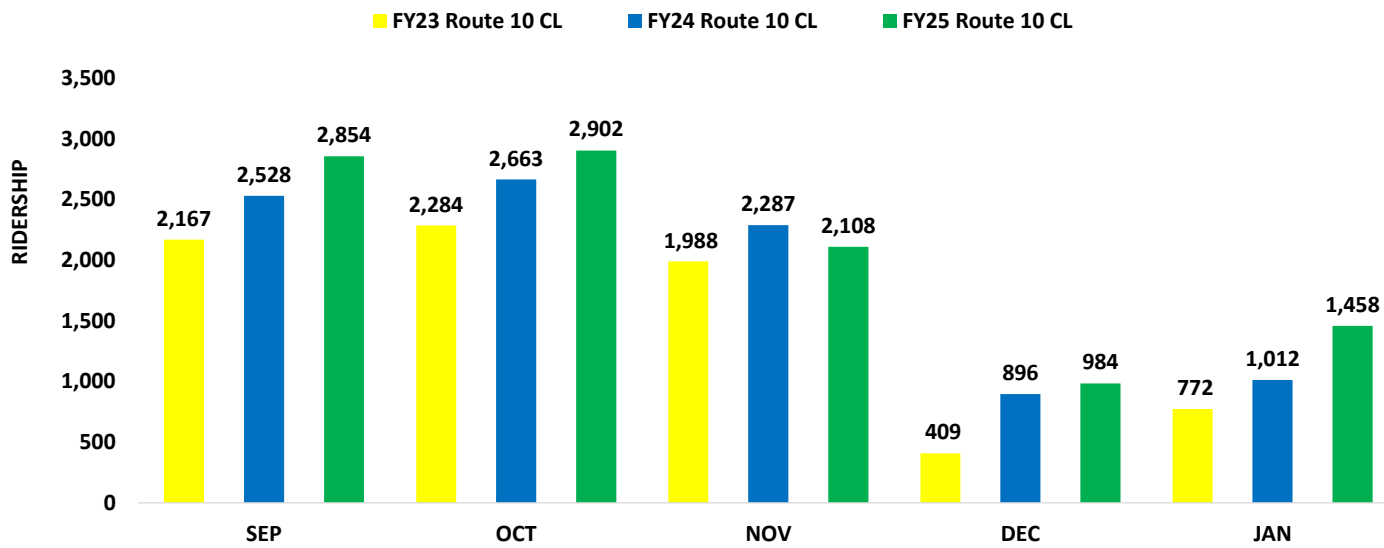
The Haul Pass program was introduced in August 2018.

This chart represents monthly ridership on the Haul Pass COD.

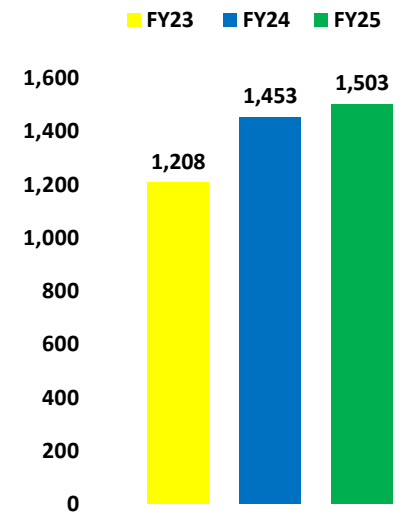
ID Card swipe contributed 264 rides Token Transit contributed 4,926 rides. 31 Day Paper Pass contributed 198 rides.

COD moved over to Token Transit & 31 Day University Paper Pass as of June 3, 2024.

### Haul Pass CSUSB Ridership - January 2025



### CSUSB Fixed Route Ridership Total



The Haul Pass CSUSB program was introduced in September 2019.

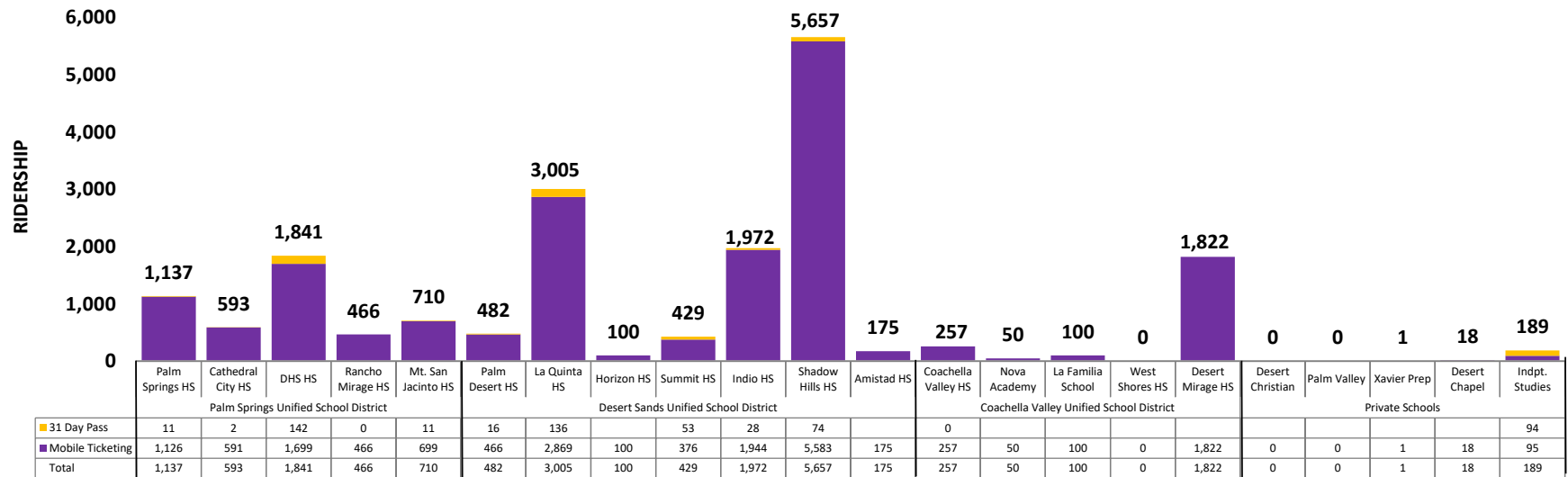
This chart represents monthly ridership on the Haul Pass CSUSB.

For the month of January 2025, CSUSB contributed 1,644 rides from 249 unique users. From that total, 1,458 rides were used on Route 10 and 186 rides on the fixed route system.



## High School Haul Pass - January 2025

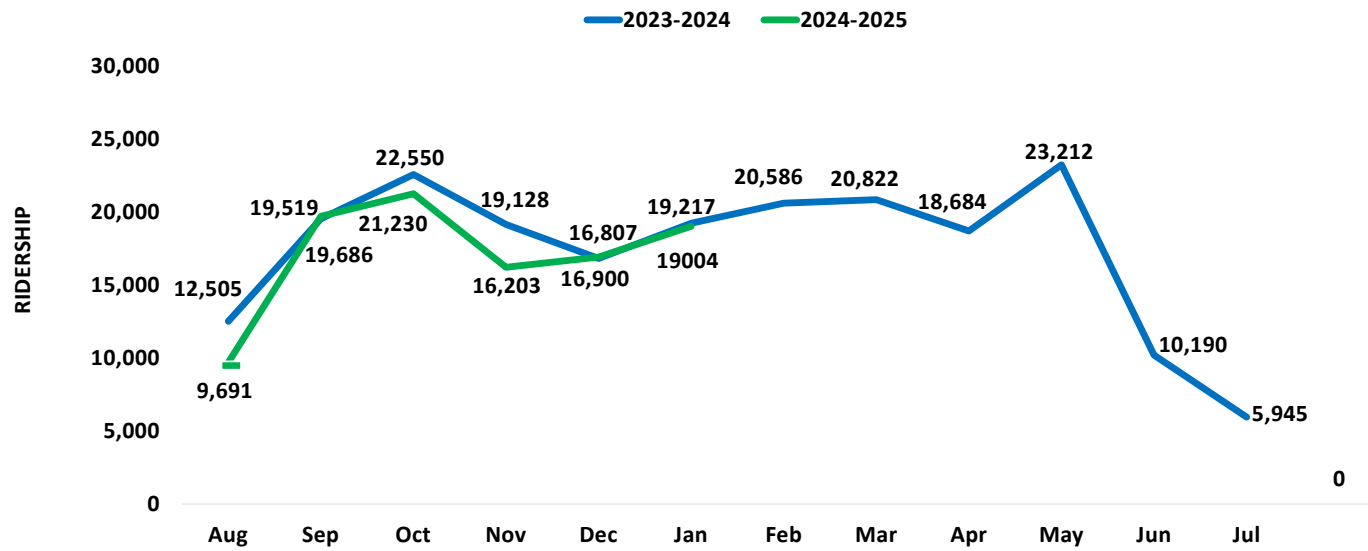
■ Mobile Ticketing   
 ■ 31 Day Pass



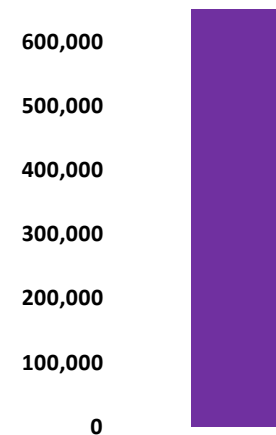
The High School Haul Pass program was introduced in August 2021.

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

### High School Haul Pass - Year to Date



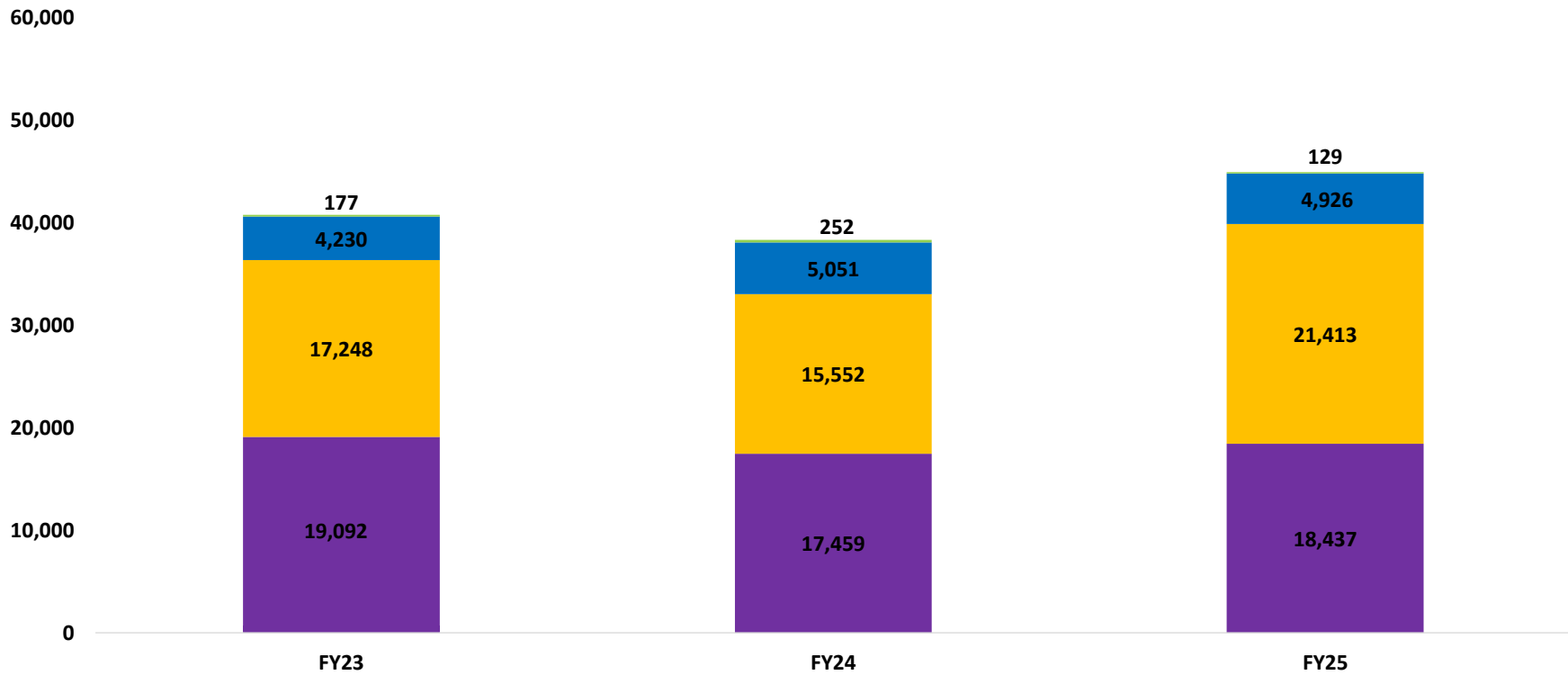
### High School Haul Pass Ridership Total



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

## Mobile Ticketing Usage - January 2025

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



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

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

DATE: March 26, 2025 **APPROVE**

TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of Quarterly Performance Summary for Q4 of Calendar Year  
2024

Summary:

The following quarterly reports demonstrate the performance of the bargaining and non-bargaining pension plans for the fourth 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 down 1.35% and 1.36%, respectively, for the fourth 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 &amp; Performance

	Allocation		Performance(%)						
	Market Value (\$)	%	1 Quarter	2024	1 Year	3 Years	5 Years	Since Inception	Inception Date
<b>Total Fund</b>	<b>43,259,160</b>	<b>100.00</b>	<b>-1.35</b>	<b>10.59</b>	<b>10.59</b>	<b>2.01</b>	<b>6.86</b>	<b>7.43</b>	<b>07/01/2017</b>
<i>PFM Blended Benchmark</i>			-1.89	9.86	9.86	2.08	5.96	6.78	07/01/2017
<b>Domestic Equity</b>	<b>12,548,194</b>	<b>29.01</b>	<b>2.71</b>	<b>23.47</b>	<b>23.47</b>	<b>7.01</b>	<b>N/A</b>	<b>10.29</b>	<b>04/01/2021</b>
<i>Russell 3000 Index</i>			2.63	23.81	23.81	8.01	13.86	11.20	04/01/2021
Schwab US Large-Cap ETF - (SCHX)	11,853,232	27.40	2.81	24.91	24.91	8.48	14.36	3.53	11/01/2024
<i>Russell 1000 Index</i>			2.75	24.51	24.51	8.41	14.28	3.47	11/01/2024
Undisc Managers Behavioral Val R6 - (UBVFX)	409,736	0.95	-0.32	10.35	10.35	7.73	11.75	0.80	11/01/2024
Columbia Small Cap Growth Inst3 - (CSGYX)	285,226	0.66	4.00	24.45	24.45	-0.04	10.65	3.49	11/01/2024
<i>Russell 2000 Index</i>			0.33	11.54	11.54	1.24	7.40	1.80	11/01/2024
<b>International Equity</b>	<b>6,589,480</b>	<b>15.23</b>	<b>-8.12</b>	<b>3.61</b>	<b>3.61</b>	<b>-2.89</b>	<b>N/A</b>	<b>-1.02</b>	<b>04/01/2021</b>
<i>MSCI AC World ex USA (Net)</i>			-7.60	5.53	5.53	0.82	4.10	1.76	04/01/2021
Vanguard Total International Stock ETF	2,065,732	4.78	-7.39	5.20	5.20	0.71	4.32	10.87	04/01/2020
<i>MSCI AC World ex USA (Net)</i>			-7.60	5.53	5.53	0.82	4.10	10.33	04/01/2020
Harding Loevner International Equity	482,359	1.12	-8.95	1.22	1.22	-2.42	3.94	5.49	07/01/2020
<i>MSCI AC World ex USA (Net)</i>			-7.60	5.53	5.53	0.82	4.10	7.31	07/01/2020
Goldman Sachs GQG Ptnrs Intl Opportunities	721,018	1.67	-10.34	5.19	5.19	4.53	8.27	11.54	09/01/2023
<i>MSCI AC World ex USA (Net)</i>			-7.60	5.53	5.53	0.82	4.10	9.00	09/01/2023
Vanguard FTSE Developed Markets ETF	3,104,761	7.18	-8.13	3.07	3.07	0.91	4.79	3.33	03/01/2022
<i>MSCI EAFE (net)</i>			-8.11	3.82	3.82	1.65	4.73	4.19	03/01/2022
Hartford Schroders Emerging Markets Equity	215,610	0.50	-6.18	7.80	7.80	-2.91	1.49	1.15	03/01/2018
<i>MSCI EM (net)</i>			-8.01	7.50	7.50	-1.92	1.70	0.93	03/01/2018
<b>Other Growth</b>	<b>2,829,589</b>	<b>6.54</b>	<b>-1.97</b>	<b>10.32</b>	<b>10.32</b>	<b>9.23</b>	<b>N/A</b>	<b>14.49</b>	<b>04/01/2021</b>
Cohen & Steers Inst Realty Shares	693,342	1.60	-8.59	6.24	6.24	-3.40	4.58	-5.95	11/01/2024
<i>MSCI US REIT Index</i>			-6.12	8.75	8.75	-2.26	4.31	-3.33	11/01/2024
NB Secondary Opportunities Fund V Offshore[CE]	2,136,247	4.94	0.00	12.54	12.54	40.12	N/A	42.93	03/01/2022
<i>CA US Private Equity Index</i>			0.00	6.37	6.37	3.48	13.98	3.68	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 &amp; Performance

	Allocation		Performance(%)						
	Market Value (\$)	%	1 Quarter	2024	1 Year	3 Years	5 Years	Since Inception	Inception Date
<b>Fixed Income</b>	<b>17,758,481</b>	<b>41.05</b>	<b>-2.62</b>	<b>2.75</b>	<b>2.75</b>	<b>-1.47</b>	<b>0.32</b>	<b>1.63</b>	<b>07/01/2017</b>
<i>Blmbg. U.S. Aggregate</i>			-3.06	1.25	1.25	-2.41	-0.33	1.07	07/01/2017
Baird Core Plus	4,954,535	11.45	-2.67	2.54	2.54	-1.52	0.56	1.82	07/01/2017
<i>Blmbg. U.S. Aggregate</i>			-3.06	1.25	1.25	-2.41	-0.33	1.07	07/01/2017
DoubleLine Core Fixed Income	1,800,199	4.16	-2.55	3.04	3.04	-1.47	0.14	1.16	09/01/2017
PGIM Total Return Bond Fund	4,039,372	9.34	-2.67	3.02	3.02	-1.86	0.20	1.61	09/01/2017
<i>Blmbg. U.S. Aggregate</i>			-3.06	1.25	1.25	-2.41	-0.33	0.91	09/01/2017
Voya Intermediate Bond	2,111,266	4.88	-2.77	2.93	2.93	-1.83	0.27	0.27	01/01/2020
<i>Blmbg. U.S. Aggregate</i>			-3.06	1.25	1.25	-2.41	-0.33	-0.33	01/01/2020
iShares Core US Aggregate Bond ETF	3,395,570	7.85	-3.05	1.37	1.37	-2.37	-0.34	1.90	02/01/2023
<i>Blmbg. U.S. Aggregate</i>			-3.06	1.25	1.25	-2.41	-0.33	1.89	02/01/2023
iShares Intermediate-Term Corporate Bond ETF	753,952	1.74	-2.66	3.67	3.67	-0.92	0.95	1.16	10/01/2019
<i>ICE BofA U.S. Corporate 5-10 Year Index</i>			-2.65	3.68	3.68	-1.03	1.00	1.19	10/01/2019
NYLI MacKay High Yield Corp Bond Fund	703,587	1.63	0.20	7.14	7.14	3.41	4.17	3.55	06/01/2021
<i>ICE BofA US High Yield Index</i>			0.16	8.20	8.20	2.91	4.04	3.28	06/01/2021
<b>Other Income</b>	<b>2,972,077</b>	<b>6.87</b>	<b>0.00</b>	<b>7.28</b>	<b>7.28</b>	<b>0.07</b>	<b>N/A</b>	<b>0.56</b>	<b>09/01/2021</b>
Golub Capital Partners International XIV[CE]	1,620,000	3.74	0.00	7.41	7.41	N/A	N/A	10.09	04/01/2023
<i>Cliffwater Direct Lending Index</i>			0.00	8.52	8.52	8.96	9.00	10.19	04/01/2023
A TEL Private Debt Partners II[CE]	452,077	1.05	0.00	6.85	6.85	6.90	N/A	6.82	10/01/2021
<i>Cliffwater Direct Lending Index</i>			0.00	8.52	8.52	8.96	9.00	9.02	10/01/2021
Blackstone Infrastructure Partners[CE]	900,000	2.08	0.00	N/A	N/A	N/A	N/A	0.00	11/01/2024
<i>NCREIF Fund Index-Open End Diversified Core Equity</i>			0.00	-2.56	-2.56	-2.70	2.64	0.00	11/01/2024
<b>Cash Equivalent</b>	<b>561,339</b>	<b>1.30</b>	<b>1.14</b>	<b>5.13</b>	<b>5.13</b>	<b>3.81</b>	<b>2.35</b>	<b>2.13</b>	<b>07/01/2017</b>
First American Prime Obligation - Z	561,339	1.30	1.21	5.25	5.25	3.98	2.48	2.30	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. 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.

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 &amp; Performance

	Allocation		Performance(%)						
	Market Value (\$)	%	1 Quarter	2024	1 Year	3 Years	5 Years	Since Inception	Inception Date
<b>Total Fund - Non-Bargaining</b>	<b>43,438,127</b>	<b>100.00</b>	<b>-1.36</b>	<b>10.56</b>	<b>10.56</b>	<b>2.00</b>	<b>6.86</b>	<b>7.42</b>	<b>07/01/2017</b>
<i>PFM Blended Benchmark</i>			<i>-1.89</i>	<i>9.86</i>	<i>9.86</i>	<i>2.08</i>	<i>5.96</i>	<i>6.78</i>	<i>07/01/2017</i>
<b>Domestic Equity</b>	<b>12,506,039</b>	<b>28.79</b>	<b>2.71</b>	<b>23.47</b>	<b>23.47</b>	<b>7.02</b>	<b>N/A</b>	<b>10.29</b>	<b>04/01/2021</b>
<i>Russell 3000 Index</i>			<i>2.63</i>	<i>23.81</i>	<i>23.81</i>	<i>8.01</i>	<i>13.86</i>	<i>11.20</i>	<i>04/01/2021</i>
Schwab US Large-Cap ETF - (SCHX)	11,818,277	27.21	2.81	24.91	24.91	8.48	14.36	3.53	11/01/2024
<i>Russell 1000 Index</i>			<i>2.75</i>	<i>24.51</i>	<i>24.51</i>	<i>8.41</i>	<i>14.28</i>	<i>3.47</i>	<i>11/01/2024</i>
Undisc Managers Behavioral Val R6 - (UBVFX)	405,491	0.93	-0.32	10.35	10.35	7.73	11.75	0.80	11/01/2024
Columbia Small Cap Growth Inst3 - (CSGYX)	282,271	0.65	4.00	24.45	24.45	-0.04	10.65	3.49	11/01/2024
<i>Russell 2000 Index</i>			<i>0.33</i>	<i>11.54</i>	<i>11.54</i>	<i>1.24</i>	<i>7.40</i>	<i>1.80</i>	<i>11/01/2024</i>
<b>International Equity</b>	<b>6,542,056</b>	<b>15.06</b>	<b>-8.12</b>	<b>3.62</b>	<b>3.62</b>	<b>-2.89</b>	<b>N/A</b>	<b>-1.02</b>	<b>04/01/2021</b>
<i>MSCI AC World ex USA (Net)</i>			<i>-7.60</i>	<i>5.53</i>	<i>5.53</i>	<i>0.82</i>	<i>4.10</i>	<i>1.76</i>	<i>04/01/2021</i>
Vanguard Total International Stock ETF	2,112,523	4.86	-7.39	5.20	5.20	0.71	4.32	10.87	04/01/2020
<i>MSCI AC World ex USA (Net)</i>			<i>-7.60</i>	<i>5.53</i>	<i>5.53</i>	<i>0.82</i>	<i>4.10</i>	<i>10.33</i>	<i>04/01/2020</i>
Harding Loevner International Equity	481,557	1.11	-8.95	1.22	1.22	-2.42	3.94	5.49	07/01/2020
<i>MSCI AC World ex USA (Net)</i>			<i>-7.60</i>	<i>5.53</i>	<i>5.53</i>	<i>0.82</i>	<i>4.10</i>	<i>7.31</i>	<i>07/01/2020</i>
Goldman Sachs GQG Ptnrs Intl Opportunities	719,852	1.66	-10.34	5.19	5.19	4.53	8.27	11.54	09/01/2023
<i>MSCI AC World ex USA (Net)</i>			<i>-7.60</i>	<i>5.53</i>	<i>5.53</i>	<i>0.82</i>	<i>4.10</i>	<i>9.00</i>	<i>09/01/2023</i>
Vanguard FTSE Developed Markets ETF	3,013,138	6.94	-8.13	3.07	3.07	0.91	4.79	3.33	03/01/2022
<i>MSCI EAFE (net)</i>			<i>-8.11</i>	<i>3.82</i>	<i>3.82</i>	<i>1.65</i>	<i>4.73</i>	<i>4.19</i>	<i>03/01/2022</i>
Hartford Schroders Emerging Markets Equity	214,986	0.49	-6.18	7.80	7.80	-2.91	1.49	1.15	03/01/2018
<i>MSCI EM (net)</i>			<i>-8.01</i>	<i>7.50</i>	<i>7.50</i>	<i>-1.92</i>	<i>1.70</i>	<i>0.93</i>	<i>03/01/2018</i>
<b>Other Growth</b>	<b>2,875,811</b>	<b>6.62</b>	<b>-2.06</b>	<b>10.21</b>	<b>10.21</b>	<b>9.19</b>	<b>N/A</b>	<b>14.46</b>	<b>04/01/2021</b>
Cohen & Steers Inst Realty Shares	739,564	1.70	-8.59	6.24	6.24	-3.40	4.58	-5.95	11/01/2024
<i>MSCI US REIT Index</i>			<i>-6.12</i>	<i>8.75</i>	<i>8.75</i>	<i>-2.26</i>	<i>4.31</i>	<i>-3.33</i>	<i>11/01/2024</i>
NB Secondary Opportunities Fund V Offshore[CE]	2,136,247	4.92	0.00	12.54	12.54	40.12	N/A	42.93	03/01/2022
<i>CA US Private Equity Index</i>			<i>0.00</i>	<i>6.37</i>	<i>6.37</i>	<i>3.48</i>	<i>13.98</i>	<i>3.68</i>	<i>03/01/2022</i>

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 &amp; Performance

	Allocation		Performance(%)						
	Market Value (\$)	%	1 Quarter	2024	1 Year	3 Years	5 Years	Since Inception	Inception Date
<b>Fixed Income</b>	<b>17,828,363</b>	<b>41.04</b>	<b>-2.62</b>	<b>2.75</b>	<b>2.75</b>	<b>-1.47</b>	<b>0.32</b>	<b>1.62</b>	<b>07/01/2017</b>
<i>Blmbg. U.S. Aggregate</i>			-3.06	1.25	1.25	-2.41	-0.33	1.07	07/01/2017
Baird Core Plus	4,996,618	11.50	-2.67	2.54	2.54	-1.52	0.56	1.82	07/01/2017
<i>Blmbg. U.S. Aggregate</i>			-3.06	1.25	1.25	-2.41	-0.33	1.07	07/01/2017
DoubleLine Core Fixed Income	1,795,800	4.13	-2.55	3.04	3.04	-1.47	0.14	1.16	09/01/2017
PGIM Total Return Bond Fund	4,083,414	9.40	-2.67	3.02	3.02	-1.86	0.20	1.61	09/01/2017
<i>Blmbg. U.S. Aggregate</i>			-3.06	1.25	1.25	-2.41	-0.33	0.91	09/01/2017
Voya Intermediate Bond	2,106,697	4.85	-2.77	2.93	2.93	-1.83	0.27	0.27	01/01/2020
<i>Blmbg. U.S. Aggregate</i>			-3.06	1.25	1.25	-2.41	-0.33	-0.33	01/01/2020
iShares Core US Aggregate Bond ETF	3,388,302	7.80	-3.05	1.37	1.37	-2.37	-0.34	1.90	02/01/2023
<i>Blmbg. U.S. Aggregate</i>			-3.06	1.25	1.25	-2.41	-0.33	1.89	02/01/2023
iShares Intermediate-Term Corporate Bond ETF	755,806	1.74	-2.66	3.67	3.67	-0.92	0.95	1.16	10/01/2019
<i>ICE BofA U.S. Corporate 5-10 Year Index</i>			-2.65	3.68	3.68	-1.03	1.00	1.19	10/01/2019
NYLI MacKay High Yield Corp Bond Fund	701,726	1.62	0.20	7.14	7.14	3.41	4.17	3.55	06/01/2021
<i>ICE BofA US High Yield Index</i>			0.16	8.20	8.20	2.91	4.04	3.28	06/01/2021
<b>Other Income</b>	<b>2,972,077</b>	<b>6.84</b>	<b>0.00</b>	<b>7.28</b>	<b>7.28</b>	<b>0.06</b>	<b>N/A</b>	<b>0.55</b>	<b>09/01/2021</b>
Golub Capital Partners International XIV[CE]	1,620,000	3.73	0.00	7.41	7.41	N/A	N/A	10.09	04/01/2023
<i>Cliffwater Direct Lending Index</i>			0.00	8.52	8.52	8.96	9.00	10.19	04/01/2023
A TEL Private Debt Partners II[CE]	452,077	1.04	0.00	6.85	6.85	6.92	N/A	6.84	10/01/2021
<i>Cliffwater Direct Lending Index</i>			0.00	8.52	8.52	8.96	9.00	9.02	10/01/2021
Blackstone Infrastructure Partners[CE]	900,000	2.07	0.00	N/A	N/A	N/A	N/A	0.00	11/01/2024
<i>NCREIF Fund Index-Open End Diversified Core Equity</i>			0.00	-2.56	-2.56	-2.70	2.64	0.00	11/01/2024
<b>Cash Equivalent</b>	<b>713,781</b>	<b>1.64</b>	<b>1.14</b>	<b>5.15</b>	<b>5.15</b>	<b>3.86</b>	<b>2.38</b>	<b>2.15</b>	<b>07/01/2017</b>
First American Prime Obligation - Z	713,781	1.64	1.21	5.25	5.25	3.98	2.48	2.30	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. 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.

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



**SunLine Transit Agency**

**CONSENT CALENDAR**

DATE: March 26, 2025

**APPROVE**

TO: Finance/Audit Committee  
Board of Directors

RE: Acceptance of Board Member Attendance for February 2025

Summary:

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

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		X		X					10	5
Palm Desert	X		X	X		X	X	X					10	6
Palm Springs	X		X	X		X	X	X					10	6
Cathedral City	X		X	X			X	X					10	5
Rancho Mirage	X		X	X		X	X	X					10	6
Indian Wells	X			X		X		X					10	4
La Quinta	X		X	X		X	X	X					10	6
Indio	X		X	X		X	X	X					10	6
Coachella	X		X	X			X						10	4
County of Riverside	X		X	X		X	X	X					10	6

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

**DARK –**

**SunLine Transit Agency**

**CONSENT CALENDAR**

DATE: March 26, 2025

**APPROVE**

TO: Board of Directors

RE: Approval of Joint Board Meeting Minutes for February 26, 2025

Summary:

The attached report summarizes the Joint Board Meeting Minutes from the Board of Directors' meeting held on February 26, 2025.

Recommendation:

Approve.

## **MINUTES**

### **Joint SunLine Transit Agency/SunLine Services Group Board of Directors Meeting February 26, 2025**

A joint regular meeting of the SunLine Transit Agency and SunLine Services Group Board of Directors was held at 12:00 p.m. on Wednesday, February 26, 2025 in the Board Room at SunLine Transit Agency, 32-505 Harry Oliver Trail, Thousand Palms, CA 92276.

#### **1. CALL TO ORDER**

The meeting was called to order at 12:01 p.m. by Chairperson Ross.

#### **2. FLAG SALUTE**

Vice-Chair Mallotto 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

Bruce Whitman, SunLine Agency Board Member, City of Indian Wells

Daniel Pitts, SunLine Agency Board Member, City of Desert Hot Springs

Glenn Miller, SunLine Agency Board Member, City of Indio

Grace Garner, SunLine Agency Board Member, City of Palm Springs

Jan Harnik, SunLine Agency Board Member, City of Palm Desert

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

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

#### **4. FINALIZATION OF AGENDA**

No changes to the agenda.

#### **5. PUBLIC COMMENTS**

Two (2) public comments were made by:

- Michael Joseph Pitkin
- Anthony Garcia

**SUNLINE TRANSIT AGENCY/  
SUNLINE SERVICES GROUP  
BOARD OF DIRECTORS MEETING - MINUTES  
FEBRUARY 26, 2025**

**6. PRESENTATIONS**

None.

**7. BOARD MEMBER COMMENTS**

Board Member comments were made by:

- Supervisor Perez, County of Riverside

**8. CONSENT CALENDAR**

Board Member Peña moved to approve the consent calendar. The motion was seconded by Vice-Chair Mallotto. The motion was approved by a unanimous vote of 9 yes; 0 no; 0 abstain.

**9. AWARD OF CONTRACT FOR CAD/AVL TECHNOLOGY AND SERVICES**

Finance/Audit Committee Chair Mallotto reported that this item was brought to the Finance/Audit Committee and they unanimously motioned to approve this item. SunLine Transit Agency Board Member Mallotto moved to approve the Award of Contract for CAD/AVL Technology and Services. The motion was approved by a unanimous vote of 9 yes; 0 no; 0 abstain.

**10. AUTHORIZE EXECUTION OF MASTER AGREEMENT AND PROGRAM SUPPLEMENT WITH THE CALIFORNIA DEPARTMENT OF TRANSPORTATION FOR RECEIPT OF A \$612,200 TRANSIT AND INTERCITY RAIL CAPITAL PROGRAM GRANT**

Finance/Audit Committee Chair Mallotto reported that this item was brought to the Finance/Audit Committee and they unanimously motioned to approve this item. SunLine Transit Agency Board Member Mallotto moved to Authorize Execution of Master Agreement and Program Supplement with the California Department of Transportation for Receipt of \$612,200 Transit and Intercity Rail Capital Program Grant. The motion was approved by a unanimous vote of 9 yes; 0 no; 0 abstain.

**11. ACCESS ADVISORY COMMITTEE MEMBER**

Board Operations Committee Chair Peña reported that the committee did not meet quorum. However, Chair Peña moved to approve the appointment of a new ACCESS Advisory Committee member. The motion was approved by a unanimous vote of 9 yes; 0 no; 0 abstain.

**SUNLINE TRANSIT AGENCY/  
SUNLINE SERVICES GROUP  
BOARD OF DIRECTORS MEETING - MINUTES  
FEBRUARY 26, 2025**

**12. SECOND READING AND ADOPTION OF SUNLINE SERVICES GROUP (SSG) ORDINANCE NO. 2025-01, TAXICAB SERVICE ORDINANCE**

Taxi 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 Second Reading and Adoption of SunLine Services Group (SSG) Ordinance No. 2025-01, Taxicab Service Ordinance. The motion was approved by a unanimous vote of 9 yes; 0 no; 0 abstain.

**13. RESOLUTION NO. 099 ADOPTING SUNLINE SERVICES GROUP (SSG) TAXICAB PERMITTING FEES FOR FISCAL YEAR 2026**

Taxi 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 Resolution No. 099 Adopting SunLine Services Group (SSG) Taxicab Permitting Fees for Fiscal Year 2026. The motion was approved by a unanimous vote of 9 yes; 0 no; 0 abstain.

**14. LEGISLATIVE UPDATE FOR FEBRUARY 2025**

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

Comments were made by:

- Supervisor Perez, County of Riverside
- Board Member Peña, City of La Quinta

**15. CEO/GENERAL MANAGER'S REPORT**

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

**16. CLOSED SESSION**

**a) CONFERENCE WITH LABOR NEGOTIATORS pursuant to Government Code section 54957.6**

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

**b) Pending Litigation (Cal. Govt. Code Section 54956.9(d)(1))**

Riverside County Superior Court, Case No. CVPS2301607  
Riverside County Superior Court, Case No. CVPS2301610

The Board of Directors convened to Closed Session at 12:29 p.m.

**SUNLINE TRANSIT AGENCY/  
SUNLINE SERVICES GROUP  
BOARD OF DIRECTORS MEETING - MINUTES  
FEBRUARY 26, 2025**

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

The open session resumed at 1:54 p.m. The General Counsel reported that the Board gave legal counsel appropriate guidance on how to proceed regarding items 16a and 16b.

**18. NEXT MEETING DATE**

March 26, 2025 at 12 p.m.  
Board Room  
32-505 Harry Oliver Trail  
Thousand Palms, CA 92276

**19. ADJOURN**

The SunLine Services Group and SunLine Transit Agency meeting concurrently adjourned at 1:55 p.m.

Respectfully Submitted,

Vanessa Ordorica  
Clerk of the Board

**SunLine Services Group**

**CONSENT CALENDAR**

DATE: March 26, 2025

**APPROVE**

TO: Taxi Committee  
Board of Directors

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

Summary:

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

Recommendation:

Approve.



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

<b>Vendor Filed As Name</b>	<b>Description</b>	<b>Check #</b>	<b>Payment Date</b>	<b>Payment Amount</b>
<b>Total Checks Over \$1,000</b>	\$0.00			
<b>Total Checks Under \$1,000</b>	\$1,270.00			
<b>Total Checks</b>	\$1,270.00			

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

DATE: March 26, 2025 **APPROVE**

TO: Taxi Committee  
Board of Directors

RE: Acceptance of Monthly Budget Variance Report for January 2025

Summary:

The budget variance report compares revenues and expenses to the respective line item budgets. The report identifies current monthly revenues and expenses as well as fiscal year to date (FYTD) values. The budgetary figures are represented as a straight line budget. Accordingly, the current monthly budget values are calculated by taking 1/12<sup>th</sup> of the annual budget. The FYTD budget values for the month of January 2025 are equal to 7/12<sup>ths</sup> of the yearly budget.

Year to Date Summary

- As of January 31, 2025, the organization's revenues are \$37,805 or 34.18% above the FYTD budget.
- As of January 31, 2025, expenditures are \$31,105 or 28.12% below the FYTD budget.
- The net FYTD operating gain (loss) after expenses is \$68,910.

Recommendation:

Approve.

SunLine Regulatory Administration  
Budget Variance Report  
January 2025

Description	FY25 Total Budget	Current Month			Year to Date			
		Actual	Budget	Positive (Negative)	FYTD Actual	FY25 FYTD Budget	Positive (Negative)	Percentage Remaining
<b>Revenues:</b>								
Revenue Fines	3,500	-	292	(292)	1,225	2,042	(817)	65.0%
New Driver Permit Revenue	750	150	63	88	1,050	438	613	-40.0%
Taxi Business Permit	96,000	10,668	8,000	2,668	69,857	56,000	13,857	27.2%
Driver Transfer Revenue	125	100	10	90	225	73	152	-80.0%
Driver Renewal Revenue	1,725	250	144	106	1,475	1,006	469	14.5%
Driver Permit Reinstatement/Replacement	-	10	-	10	30	-	30	0%
Vehicle Permit Revenue	86,000	8,462	7,167	1,296	74,543	50,167	24,376	13.3%
Operator Application Fee	1,500	-	125	(125)	-	875	(875)	100.0%
<b>Total Revenue</b>	<b>189,600</b>	<b>19,640</b>	<b>15,800</b>	<b>3,840</b>	<b>148,405</b>	<b>110,600</b>	<b>37,805</b>	<b>34.2%</b>
<b>Expenses:</b>								
Salaries and Wages	88,369	4,285	7,364	3,080	30,211	51,549	21,337	65.8%
Fringe Benefits	61,290	4,322	5,108	786	11,824	35,753	23,929	80.7%
Services	18,315	3,033	1,526	(1,507)	25,627	10,684	(14,943)	-39.9%
Supplies and Materials	3,585	-	299	299	10,789	2,091	(8,697)	-200.9%
Utilities	5,802	-	484	484	-	3,385	3,385	100.0%
Casualty and Liability	5,589	-	466	466	-	3,260	3,260	100.0%
Taxes and Fees	50	-	4	4	-	29	29	100.0%
Miscellaneous	6,600	62	550	488	1,045	3,850	2,805	84.2%
<b>Total Expenses</b>	<b>189,600</b>	<b>11,701</b>	<b>15,800</b>	<b>4,099</b>	<b>79,495</b>	<b>110,600</b>	<b>31,105</b>	<b>28.1%</b>
<b>Total Operating Surplus (Deficit)</b>	<b>\$ -</b>	<b>\$ 7,939</b>			<b>\$ 68,910</b>			

---

**Revenue**

- The positive variance in revenue is largely due to increases in vehicle permit revenue and taxi business permit revenue due to one (1) unanticipated additional taxi business for FY2!
- As of FYTD25, there is a decrease of 2,696 taxi trips compared to FYTD24.

**Taxi Trips**

	FY24-January	FY25-January	Variance	%Δ
Trips	9,147	10,505	1,358	14.8%

**Taxi Trips**

	FYTD-FY24	FYTD-FY25	Variance	%Δ
Trips	57,227	54,531	(2,696)	-4.7%

**Salaries and Wages**

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

**Fringe Benefits**

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

**Services**

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

**Supplies and Materials**

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

**Utilities**

- Utility expenses are within an acceptable range of the budget

**Casualty and Liability**

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

**Taxes and Fees**

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

**Miscellaneous**

- Miscellaneous expenses are within an acceptable range of the budget

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

DATE: March 26, 2025

**APPROVE**

TO: Taxi Committee  
Board of Directors

RE: Acceptance of Taxi Trip Data – January 2025

Summary:

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

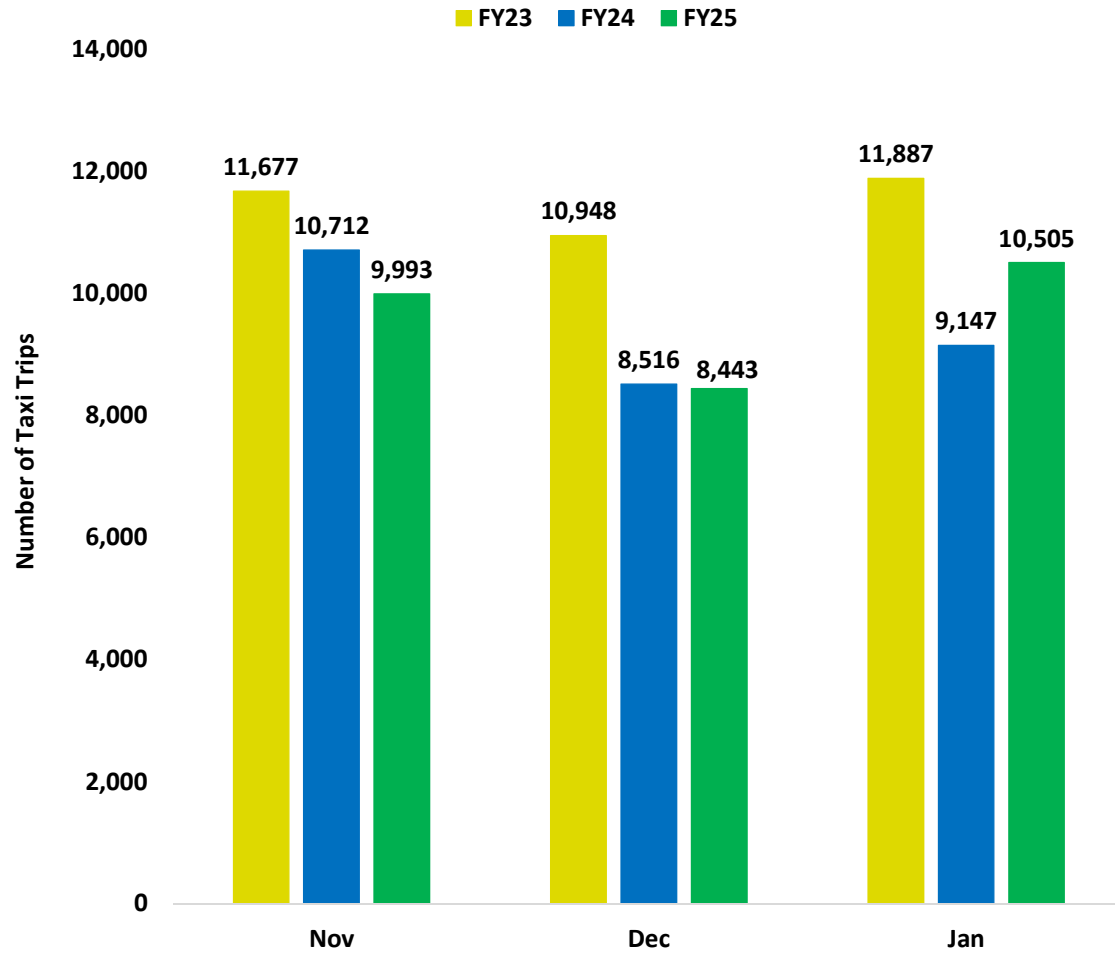
For the month of January, there were 1,358 more taxi trips in January 2025 serviced by 14 more cabs when compared to January 2024 (83 cabs in 2025 compared to 69 cabs in 2024).

There were 2,696 fewer taxi trips for FYTD25 compared to FYTD24.

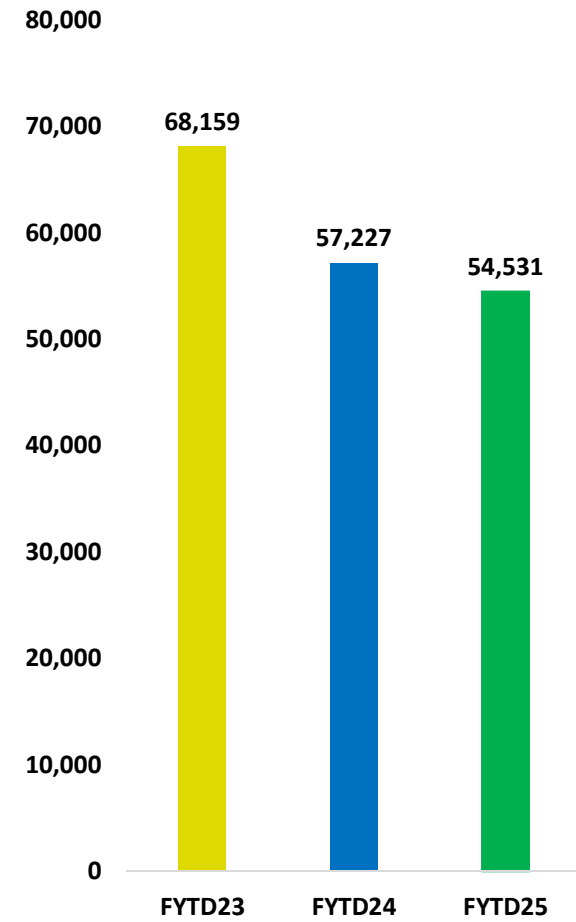
Recommendation:

Approve.

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



### FYTD No. of Taxi Trips



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

**SunLine Transit Agency**

**DATE:** March 26, 2025 **ACTION**

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

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

**RE:** Approval of Pension Investment Management Services

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**Recommendation**

Recommend that the Board of Directors delegate authority to the CEO/General Manager, or designee, to negotiate and execute a seven (7) year contract with two (2) one-year renewal options, with PFM Asset Management (PFM) for pension investment management services. The contract amount shall not exceed \$1,568,000 and is subject to approval as to form by General Counsel.

**Background**

SunLine Transit Agency administers three (3) distinct pension plans for its employees. Currently, the assets for these plans are held by US Bank as the trustee, with investments directed by PFM under SunLine's investment policy. PFM was contracted for investment management services in 2017, and this contract is set to expire on June 30, 2025. As of the most recent actuarial evaluation, all three (3) pension plans are fully funded, with combined assets exceeding \$86 million.

On October 7, 2024, staff issued Request for Proposals (RFP) 25-019. The RFP was advertised in a newspaper of general circulation, posted on SunLine's website, and distributed along with the RFP document. Through this solicitation, SunLine identified nine (9) potential proposers. By the proposal deadline on November 7, 2024, two (2) proposals were received.

An evaluation committee, consisting of representatives from the pension committees, assessed the proposals based on the criteria outlined in the RFP, including experience, qualifications, business demographics, services offered, and pricing. Following a comprehensive review, the evaluation committee determined that PFM provided the best overall value for SunLine. A price analysis confirmed that the proposed rates are fair and reasonable.

In December, staff reviewed overall pension administration items with the Board. As a result of the improvements discussed in December, agreements related to pension

administration will be managed by the respective pension committees and will not require Board approval going forward.

**Financial Impact**

The total estimated contract cost of \$1,568,000 over seven (7) years will be funded through the respective pension committee trust funds and will not impact SunLine's annual operating budget.

**Performance Goal**

**Goal 3: Organizational Health & Resiliency** – Approval of this contract will ensure the continued responsible administration of SunLine's pension plans, maintaining their fully funded status.

**Approved/Reviewed by:**

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

Attachments:

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





REQUEST FOR PROPOSAL  
PENSION PLAN INVESTMENT SERVICE  
25-019

**PRICE ANALYSIS**


	PFM Asset Nov 2024	Fisher Asset Nov 2024	Independent Cost Oct 2024	
Years 1-5	\$ 1,120,000.00	\$ 2,465,250.00	\$ 1,140,000.00	
Year 6 Fee	\$ 224,000.00	\$ 493,050.00	\$ 228,000.00	
Year 7 Fee	\$ 224,000.00	\$ 493,050.00	\$ 228,000.00	
<b>Total Proposal Value for 7 year period</b>	<b>\$ 1,568,000.00</b>	<b>\$ 3,451,350.00</b>	<b>\$ 1,596,000.00</b>	

	Difference	Delta
Difference between PFM and Independent Cost Estimate	\$ (28,000.00)	-1.79%
Difference between PFM and Fisher Asset	\$(1,883,350.00)	120.11%

There was adequate price comparison for the Pension Plan Investment Services since two (2) bidders independently contended and a cost estimate based upon actuals was prepared. The 7 year award is based on the highest evaluated proposal factors; 1) Experience/Qualifications, 2) Business Demographics, 3) Services Offered and 4) Price. As a result of the 3 person evaluation committee's review, PFM Asset Management scored 263 out of 300 points compared to 210 for Fisher Asset Management.

Based upon the committee review of the proposals and the above analysis, PFM Asset's price is considered fair and reasonable and determined to provide the best value to the Agency.

Prepared by:

  
Sara Parrish  
25-Feb-25

PLANETBIDS SOLICITATION LIST PENSION PLAN INVESTMENT MANAGEMENT SERVICES

Company Name	Address	City	State	Zip	Contact Name	Email
Deltek	2291 Wood Oak Dr	Herndon	Virginia	20171	Source Management	sourcemanagement@deltek.com
<b>Fisher Asset Management, LLC</b>	<b>6500 International Pkwy, Ste 2050</b>	<b>Plano</b>	<b>Texas</b>	<b>75093</b>	<b>Kelsey</b>	<b>fisherinstitutional@fi.com</b>
Garcia Hamilton & Associates, L.P.	1401 McKinney St Suite 1600	Houston	Texas	77010	Ruby Dang	ruby@garciahiltonassociates.com
Lead Pursuits LLC	2450 Colorado Ave.	Santa Monica	California	90404	Lead Department	leads@leadpursuits.com
MandateWire	330 Hudson Street	New York	New York	10013	Alexa	alex.foust@ft.com
<b>PFM Asset Management</b>	<b>633 West 5th Street, Suite 2560</b>	<b>Los Angeles</b>	<b>California</b>	<b>90071</b>	<b>Monique Spyke</b>	<b>PFMAMProposals@pfmam.com</b>
Pwxpress	1900 Coffeepport Rd	Jacksonville	Florida	32208	Mary Miller	bids@pwxpress.com
RVK, Inc.	222 SW Columbia Street Suite 600	Portland	Oregon	97201	John Nicolini	John.Nicolini@RVKinc.com
Seven Outsource	113 Barksdale Professional Center Newark	DE	California	19711	Steve	rfpalerts@gmail.com

Footnote: Bold font indicates companies that provided proposals

## SunLine Transit Agency

**DATE:** March 26, 2025 **ACTION**

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

**FROM:** Walter Watcher, Chief of Capital Projects

**RE:** Award of Contract for Architectural & Engineering Services Related to Workforce Training Center

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### Recommendation

Recommend that the Board of Directors delegate authority to the CEO/General Manager, or designee, to negotiate and execute a three (3) year contract with Todd Verwers Architects, Inc. for architectural and Engineering (A&E) services to design SunLine Transit Agency's (SunLine) Workforce Training Center for a not-to-exceed amount of \$499,605, upon approval as to form by General Counsel.

### Background

As SunLine continues to transition its fixed route fleet to zero emission technologies, there is a growing need for highly skilled mechanics trained in maintaining and repairing electric and hydrogen-powered buses. To address this need, SunLine has identified the development of a dedicated training facility as a strategic priority.

On December 5, 2024, staff issued Request for Qualifications (RFQu) No. 25-021 for A&E services to develop the Workforce Training Center. The RFQu was publicly advertised in a newspaper of general circulation and was posted on SunLine's website.

On January 28, 2025, SunLine received proposals from two (2) firms. An evaluation committee representing staff from the Planning & Capital Projects Departments evaluated the proposals in accordance with the criteria listed in the RFQu and the Mini-Brooks Act, which precludes the use of price as an evaluation factor. After the evaluation committee carefully reviewed all proposals, they scored and ranked them as follows:

- |                                 |            |
|---------------------------------|------------|
| • Todd Verwers Architects, Inc. | Score: 281 |
| • LOC Architects, Inc.          | Score: 231 |

Based on the above scoring, Todd Verwers Architects, Inc. was identified as the most qualified firm based on the qualification of the firm, qualifications of key personnel, detailed work plan, and past performance. On March 6, 2025, staff entered into

negotiations with the highest ranked firm to arrive at a fair and reasonable price for the work. The scope of services will include:

- Site analysis and preliminary design
- Development of architectural plans and specifications
- Coordination with engineering consultants
- Permitting and regulatory compliance
- Construction support and response to construction contractor's requests for information

In addition to the design meeting all applicable building codes and environmental regulations, it will provide a flexible state-of-the-art learning environment where students can gain both theoretical and practical knowledge. The project includes:

- **Two Classrooms** – Each classroom will be designed to accommodate up to 30 people, equipped with modern audiovisual equipment and flexible seating arrangements to support a variety of instructional formats.
- **Full-Size Bus Maintenance Bay** – The maintenance bay will be integrated with the classroom space, providing direct access for students to apply classroom learning to real-world maintenance scenarios. The bay will be designed to accommodate the latest in zero emission bus technology and include industry-standard training aids, tools and safety features.

### **Financial Impact**

The financial impact of \$499,605 will be covered by a competitive federal Low-No grant and State Transit Assistance (STA) funds. These funding sources are included in the Board-approved capital budget.

### **Performance Goal**

**Goal 1: Workforce Investment** – Approval of this item will facilitate a healthy workforce by ensuring employees are provided resources that support the knowledge, expertise and experience to meet SunLine's operational requirements

#### **In Collaboration with:**

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

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

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

Attachments:

- [Item 10a](#) – Solicitation List

PLANETBIDS SOLICITATION LIST A&E SERVICES WORK FORCE DEVELOPMENT CENTER 25-021

Company Name	Address	City	State	Zip	Contact Name	Email
Anil Verma Associates, Inc.	444 So. Flower St., Suite 1688	Los Angeles	California	90071	Anil Verma	ANILVERMA@EARTHLINK.NET
BFK	215 N Marengo Ave Ste 250	Pasadena	California	91101	Brian Knight	brian.knight@bfkarch.com
BKF Engineers	4675 MacArthur Court Suite 400	Newport Beach	California	92660	Suzi Edwards	sedwards@bkf.com
Burns Engineering, Inc.	300 North Continental Boulevard Suite 540	El Segundo	California	90245	Alva Carrasco	acarrasco@burns-group.com
Cannon/Parkin, Inc	2875 Michelle Dr Suite 210	Irvine	California	92606	Brandon Dekker	bdekkerl@cannondesign.com
CMWilliamson Engineering Corporation	41945 Boardwalk Suite R	Palm Desert	California	92211	Cody Mendez	cody@willcorpengineering.com
CSG Consultants Inc.	550 Pilgrim Drive	Foster City	California	94404	Marketing	bid_notifications@csgengr.com
Diaz Yourman & Associates	1616 East 17th Street	Santa Ana	California	92705	Anna Kadi	anna@diazyourman.com
Entram Corp	24123 Peachland Blvd	Port Charlotte	Florida	33954	John Falcone	sayres628@gmail.com
Gregory Architects, Inc.	73200 El Paseo, Suite 2D	Palm Desert	California	92260	Gregory Architects	info@gregoryarch.com
Heptagon Seven Consulting	8413 E Baseline Road Suite 106	Mesa	Arizona	85209	Brad Donais	bdonais@hept7.com
IMEG Consultants Corp	901 Via Piemonte, Suite 400	Ontario	California	91764	Leilani Doherty	leilani.l.doherty@imegcorp.com
John Kaliski Architects, Inc.	3780 Wilshire Boulevard Suite 500	Los Angeles	California	90010	Ashley Jessup	ajessup@jka-la.com
John Wyka Architecture	829 Ocean Park Blvd.	Santa Monica	California	90405	John Wyka	mail@johnwyka.com
Kewo Engineering Corporation	1370 Valley Vista Drive, Suite 200 #2114	Diamond bar	California	91765	Brian Kewo	brian.kewo@kewocorp.com
<b>LOC, Inc</b>	<b>3203 E. 4th Street</b>	<b>Los Angeles</b>	<b>California</b>	<b>90063</b>	<b>Poonam Sharma</b>	<b>poonam@loc-arch.com</b>
MARRS Services, Inc.	328 E. Commonwealth Avenue	Fullerton	California	92832	Griselda Smith	Griselda@marrscorp.com
Michael Baker International	75-410 Gerald Ford Drive, Suite 100	Palm Desert	California	92211	Sherrie Gundlach	srg@mbakerintl.com
PBS Engineers, Inc.	2100 E. Route 66, Suite 210	Glendora	California	91740	Julie Tigno	jtigno@pbsengineers.com
Psomas	865 S. Figueroa Street Suite 3200	Los Angeles	California	90017	Gina Rowe	lamarketing@psomas.com
Schmidt Design Group	1310 Rosecrans Street, Suite G	San Diego	California	92106	Reyna Adams	marketing@schmidttdesign.com
Shepphird Associates	26560 Agoura Road Suite 106	Calabasas	California	91302	Will Shepphird	will.s@shep-ae.com
Stayner Architects	4362 Melrose Avenue	Los Angeles	California	90029	Christian Stayner	rfp@staynerarchitects.com
SVA Architects, Inc.	6 Hutton Centre Drive, Suite 1150	Santa Ana	California	92707	Judy Cheng	jcheng@sva-architects.com
T & B Engineering, Inc.	4344 Latham St., Ste. 200	Riverside	California	92501	Mark Ballou	mballou@tbengineeringinc.com
TAIT & Associates, Inc.	701 N Park Center Drive	Santa Ana	California	92780	Liza Guzman	lguzman@tait.com
The W-T Group, LLC	77-771 Flora Road	Palm Desert	California	92211	Christopher Starke	CJStarke@wtgroup.com
Tighe Architecture	5757 Venice Blvd.	Los Angeles	California	90019	Patrick Tighe	businessdev@tighearchitecture.com
<b>Todd Verwers Architects Inc.</b>	<b>73411 Willow St.</b>	<b>Palm Desert</b>	<b>California</b>	<b>92260</b>	<b>Verwers Todd Blake</b>	<b>todd@toddverwers.com</b>

Footnote: Bold font indicates companies that participated in the turnkey bid

## SunLine Transit Agency

**DATE:** March 26, 2025 **ACTION**

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

**FROM:** Greg Wildman, Chief of Strategic Alignment

**RE:** Award Agreement to Insight Strategies for Performance Management Renovation, Crisis Awareness and De-escalation Training and Executive Coaching Services

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### Recommendation

Recommend that the Board of Directors delegate authority to the CEO/General Manager, or designee, to negotiate and execute an agreement with Insight Strategies, Inc. (Insight) for a performance management renovation, crisis awareness and de-escalation training, and executive coaching services for the Chief Financial Officer (CFO) and Chief Transportation Officer (CTO) for an amount not-to-exceed \$242,200, and in a form approved by legal counsel.

### Background

On March 14, 2024, Insight and SunLine Transit Agency's (SunLine) Executive Team commenced a project to create a stronger, more cohesive organizational culture, improve leadership effectiveness, and align SunLine's goals with its long-term vision. Over the past year, the Insight team has engaged with SunLine employees at all levels through one-on-one meetings, department meetings, and surveys to gather comprehensive feedback. Based on this feedback, SunLine's Executive Team and Insight have developed a new mission and vision statement and formulated SunLine's Goals and Objectives for the upcoming year, which will be presented to the Board for review in Item 14.

To further SunLine's commitment to organizational growth, staff proposes to enter into a new agreement with Insight to (1) modernize SunLine's performance management process, (2) provide crisis awareness and de-escalation training, and (3) provide executive coaching for the CFO and CTO.

If authorized by the Board, Insight will modernize SunLine's performance management by:

- Performing a comprehensive assessment of SunLine's current performance evaluation process.

- Providing recommendations for improvements to ensure alignment with organizational goals.
- Training management to effectively prepare, write, and deliver performance evaluations.
- Assisting with the implementation of a streamlined and efficient performance evaluation/review process.

In addition, Insight will implement crisis awareness and de-escalation training for SunLine staff in accordance with recent Federal regulations. SunLine is mandated to conduct de-escalation training as part of the Federal Transit Administration's (FTA) efforts to enhance the safety of transit workers. This requirement is outlined in the Bipartisan Infrastructure Law, which amended the Public Transportation Agency Safety Plans (PTASP) under 49 U.S.C. § 5329(d). 49 CFR Part 673 mandates transit agencies to establish and implement a comprehensive safety training program that includes de-escalation training. This training equips transit workers with the skills necessary to manage and defuse potentially violent situations, thereby reducing the risk of assaults and enhancing overall safety for both employees and passengers.

Finally, Insight will provide one-on-one coaching services for the CFO and CTO to continue to develop and refine associated executive skills to assume greater responsibility and provide leadership continuity. Given the complexity of the legal requirements, regulatory mandates, and regional, state and federal relationships required for operating an effective and efficient transit agency, ensuring that there are qualified individuals to lead SunLine at any moment is critically important. Furthermore, given recent difficulty across the nation to recruit and retain top talent at all levels of the agency, investing in existing leaders, who have the leadership capacity, local familiarity, deep operational, logistical and financial knowledge, and skill sets to serve as the General Manager is a sound solution for ensuring the long term sustainability and success of SunLine. This initiative aligns with Strategic Agency Goal 2: Ensure that all key positions have one or more qualified candidates to assume the roles, duties and responsibilities of executive leadership positions.

Overall, the continued partnership with Insight underscores SunLine's dedication to enhancing organizational culture, leadership effectiveness, and strategic direction. By refining SunLine's performance management process and further investing in staff development, staff aims to foster a high-performance work environment that supports employee retention/growth and overall agency success.

### **Financial Impact**

The estimated cost for this new agreement is not to exceed \$242,200, and it will be fully funded with State Local Transportation Funds (LTF) in the operating budgets for FY25 and FY26. The total estimated costs by focus area is identified in the following table.



<b>Focus Area</b>	<b>Est. Cost</b>
Performance Management Renovation	\$113,100
Crisis Awareness and De-escalation	\$83,850
Virtual Operator Training on Crisis Awareness and De-Escalation (for new operators hired after the initial training)	\$5,250
Executive Coaching for CFO & CTO	\$30,000
Est. Travel	\$10,000
	<b>\$242,200</b>

### **Performance Goal**

**Goal 1: Workforce Investment** – Facilitate a healthy workforce, and ensure that they are adequately supported and equipped with the knowledge, expertise and experience to meet the Agency’s operational requirements as they evolve and grow over time.

#### **In Collaboration with:**

Tamara Miles, Chief of Human Relations

Carissa Sanchez, Human Resources Manager/EEO Officer

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

Mona Babauta, CEO/General Manager

Luis Garcia, Chief Financial Officer

Catherine J. Groves, General Counsel

## SunLine Services Group

**DATE:**       **March 26, 2025** **ACTION**

**TO:**         **Taxi Committee**  
**Board of Directors**

**FROM:**      **Jill Plaza, Taxi/Contracted Transportation Services Administrator**

**RE:**         **First Reading of SunLine Services Group (SSG) Ordinance No. 2025-02, Taxicab Service Ordinance**

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### **Recommendation**

Recommend that the Board of Directors waive the first reading and introduce SSG Ordinance No. 2025-02 to supersede SSG Ordinance No. 2025-01.

### **Summary**

The proposed updates to the Taxicab Service Ordinance (Ordinance) are part of an ongoing effort to reform and modernize taxicab rules and regulations to ensure high standards of public safety, consumer protection and customer service, while allowing for innovation and competition. On January 16, 2025, staff met with taxicab stakeholders, including taxicab business owners and taxicab operators to discuss, establishing a maximum flat rate for taxicab trips originating from the Palm Springs International Airport (Airport) and Acrisure Arena. The outcome of this meeting was that both taxicab businesses and taxicab operators supported the revision to the Ordinance as reflected in the attached Ordinance 2025-02. Staff is additionally seeking to clarify SSG's driver's license requirements as it pertains to commercial licenses, as well as create a special music festival venue surcharge to simplify the annual surcharge approval process for the convenience of the taxicab industry.

Ordinance No. 2025-02 adopts the following changes:

- Adds requirement for applicants to provide proof of a valid California Class C or Commercial Class A Driver's License (Section 1.045.D.4)
- Establishes the right for taxicab drivers to charge a maximum flat fare of \$25 from Palm Springs International Airport and Acrisure Arena for trips that are four (4) miles or less. Trips exceeding four (4) miles will be charged the maximum flat fare for the first four (4) miles and the metered rate for any distance traveled thereafter (Section 1.070.B)
- Establishes a special music festival venue \$35 surcharge for pick-ups at the Coachella Valley Music and Arts Festival and at the Stagecoach Festival. The special music festival venue surcharge is effective only for the days on which the

respective music festivals occur. This special music festival venue surcharge is in addition to the metered rate charged by the taxicab driver (Section 1.070.G).

A redlined copy of Ordinance No. 2025-02 reflecting these changes is attached. Ordinance No. 2025-02 will be presented at the April Board meeting for a second reading and consideration for adoption.

## **Background**

### **Maximum Flat Fare for Palm Springs Airport and Acrisure Arena**

SRA staff met with stakeholders, including taxicab business owners and driver representatives in December and January regarding short fares from the Palm Springs International Airport. At the conclusion of these meetings, the taxicab owners and taxicab drivers jointly requested that SRA establish a maximum flat fare from both the Airport and Acrisure Arena. The amount requested for SRA to implement was \$25, inclusive of the airport surcharge, as reflected in the attached Ordinance 2025-02.

This request aligns with industry trends and was a suggestion of SRA's 2022 taxi study. The basis of this suggestion was that the Palm Springs International Airport is located very close to downtown Palm Springs and some resort destinations that are common trip destinations from the Airport. Under current conditions, demands for taxicabs at the Airport are greatest during specific peak periods. This has led to frustration among taxicab drivers, who wait long periods of time and may only be able to obtain one short ride during these peak periods. After completing a short trip, the taxicab driver must then return to the end of the Airport taxicab line and may not be able to obtain another ride during the peak period.

Staff researched minimum fare requirements of other jurisdictions and analyzed local Transportation Network Company (TNCs) rates from the Airport to various downtown Palm Springs hotels within a four mile radius. Los Angeles charges a minimum fare and an airport surcharge. Kings County, which includes the Seattle-Tacoma International Airport, charges a \$20 minimum fare and an airport surcharge. Other jurisdictions, such as San Francisco and Chicago, allow for taxis to return to the front of the line (line circumvention) in lieu of a minimum fare after a short trip due to special lanes constructed at their respective airports. The Airport cannot provide line circumvention for taxicab drivers due to space limitations. Local TNC rates range from \$11.87 to \$17.04 for a two (2) mile trip, compared to taxi fare of \$12 for the same two mile trip. A TNC four (4) mile trip ranged from \$17.91 to \$24.34, compared to a taxi rate of \$20. Acrisure Arena faces similar challenges for short trips due to the delays in getting in and out of Acrisure Arena.

### **Special Music Festival Venue Fee**

In accordance with SunLine Services Group Ordinance 2025-01, Section 1.070(C), "The Board may from time to time establish maximum rates for special events or fixed routes." Since 2016, the taxicab companies within SSG's jurisdiction have annually requested the Board approve an amendment to the Taxi Fee Resolution to permit a special event pick-up fee for trips from the Coachella Valley Music and Arts Festival and the Stagecoach Festival. The Board has approved a special event venue fee as an incentive to taxicab

drivers to service the music festivals. In lieu of bringing a resolution for this fee annually, staff are recommending making this special event venue fee permanent by adding language to the Ordinance.

### **Financial Impact**

There is no financial impact associated with this item.

### **Performance Goals**

**Goal 2:** Highly Trusted Mobility Solutions - 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.

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

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

### Attachments:

- [Item 12a](#) – Redlined Copy of Ordinance No. 2025-02
- [Item 12b](#) – Ordinance No. 2025-02 (Redlined Changes Accepted)

**ORDINANCE NO. 2025-024**  
**AN ORDINANCE OF SUNLINE SERVICES GROUP**  
**SUPERSEDING ORDINANCE NO. 20254-012**

**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 20254-012, 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 thirty (30) 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 ~~26<sup>th</sup>~~ ~~22<sup>nd</sup>~~ day of ~~March~~ ~~January~~, 2025.

APPROVED AND ADOPTED by the Board of Directors of SunLine Services Group at a regular meeting held on ~~26<sup>th</sup>~~ \_\_\_\_\_ day of ~~February~~ ~~April~~ \_\_\_\_\_, 2025.

\_\_\_\_\_  
Nancy Ross  
Chairperson of the Board

ATTEST:

\_\_\_\_\_  
~~Edith Hernandez-Vanessa Ordorica~~  
Clerk of the Board

APPROVED AS TO FORM:

\_\_\_\_\_  
Catherine Groves  
General Counsel

**EXHIBIT A: TAXICAB SERVICE ORDINANCE**

**CHAPTER ONE**

**ARTICLE I  
PERMITTING OF TAXICAB BUSINESSES AND DRIVERS**

- 1.010 Purpose
- 1.015 Definitions and Statutory References
- 1.020 Taxi Administrator
- 1.025 Delivery of Notices or Requests
- 1.030 Business Permit Required
- 1.035 Business Permit Renewal
- 1.040 Insurance Required
- 1.045 Driver Permit Required
- 1.050 Driver Permit Renewal and Transfer
- 1.055 Vehicle Permit Required
- 1.060 Vehicle Permit Renewal
- 1.065 Vehicle Inspections
- 1.070 Rates
- 1.075 Mandatory Controlled Substance and Alcohol Testing Program
- 1.080 Denial, Revocation, or Suspension of Permits
- 1.085 Appeal Hearings
- 1.090 Advance Deposit Hardship Waiver
- 1.095 Administrative Citation
- 1.200 Fines and Penalties
- 1.205 Late Payment Charges
- 1.210 Cost Recovery
- 1.215 Airports

**ARTICLE II  
OPERATING REQUIREMENTS**

- 2.010 Taxicab Businesses Distinct Appearance
- 2.015 Advertisements
- 2.020 Driver Standards and Appearance
- 2.025 Special Events
- 2.030 Taxi Administrator
- 2.035 Fines and Penalties

## **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. "E-Hail Application" means an application that allows customers to electronically order a permitted taxicab on demand using a smartphone or other mobile or electronic device and/or accept payment for those trips.
- 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 1<sup>st</sup> of each year and expiring June 30<sup>th</sup> 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 a valid California Class C or Commercial Class A Driver's License;
  - 4.5. Provide proof of completion for taxi business's driver safety education and training program;
  - 5.6. Provide proof of completion for taxi business's disabled access education and training program;
  - 6.7. 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;
  - 7.8. Provide SSG with a copy of the Department of Motor Vehicles Pull Notice Program enrollment, as defined in Vehicle Code Section 1808.1; and
  - 8.9. 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 1<sup>st</sup> of each year and expiring June 30<sup>th</sup> 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. For trips originating at either the Palm Springs International Airport or Acrisure Arena, a Permittee may charge customers a maximum flat fare of \$25, inclusive of any airport fees. A trip that exceeds \$25 would be charged based on the meter rate after the maximum flat fare has been charged.
- C. A Permittee may utilize an E-Hail Application to provide upfront fare estimates based on the trip distance and time (E-Hail Application Based Fare). An E-Hail Application-Based Fare may not exceed the maximum rates authorized by Section 1.070.A.
- D. A Permittee may charge customers an upfront flat rate fare through a transportation network company (TNC) E-Hail Application, such as Uber (Upfront Fare Program). Fares under the Upfront Fare Program must use dynamic pricing established by the TNC application(s) using an algorithm to calculate the upfront fare based on the trip distance and time. Meter rates cannot be applied to Upfront Fare Program trips. Section 1.070.A does not apply to the Upfront Fare Program.
- E. 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.
- F. The Board may from time to time establish maximum flat rates for special events or fixed routes.
- F.G. A special music festival venue surcharge of \$35 may be charged by Permittees for trips originating at the Coachella Valley Music and Arts Festival or at the Stagecoach Festival. The special music festival venue surcharge is effective only for days on which ~~of~~ the respective music festivals occur. This ~~special music festival venue surcharge~~ is in addition to any metered rate.
- H. 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.
- I. The Permittee shall disclose fares, fees or rates to the customer as provided for in Government Code Section 53075.5.



- J. 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.4<sup>th</sup> 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. Proposed trips that are part of the Upfront Fare Program, are considered accepted once the Driver has accepted the TNC application trip offer. If the offer accepted and then rejected, it is considered a ride refusal and subject to citation and applicable fine, unless the ride rejection is based on one or more of the exceptions set forth in Section 2.020.L.
- L. A Driver may only refuse to serve a person requesting the service of their taxicab if:
  1. The Driver has already been dispatched on another call;
  2. The passenger is engaging in physical or verbal mistreatment, including hitting, kicking, gestures, yelling, spitting, threats, intimidation, assaults, slurs, or cursing, or otherwise causing the driver to reasonably believe that the driver's health or safety, or that of others may be endangered. Discriminatory-based ride refusals are prohibited and may result in permit revocation;
  3. The passenger cannot, upon request, show ability to pay the fare;
  4. The passenger refuses to state a specific destination upon entering the taxicab; or
  5. The proposed trip is outside Riverside County.

A Driver refusing service under this section must immediately record the reason(s) for the service refusal with their dispatcher and the taxicab company dispatcher is required to maintain a written record of all service refusals.

A ride that is in the process of being completed, but which is refused under this provision, must be terminated at a safe, well-lit location, near a location where the passenger will have the ability to reasonably obtain an alternate form of transportation. In emergency situations, a driver may immediately refuse a ride and contact the police for further assistance.

- M. 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.
- N. 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.
- O. 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.
- P. 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.
- Q. 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. 2025-02**  
**AN ORDINANCE OF SUNLINE SERVICES GROUP**  
**SUPERSEDING ORDINANCE NO. 2025-01**

**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 2025-01, 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 thirty (30) 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 26<sup>th</sup> day of March, 2025.

APPROVED AND ADOPTED by the Board of Directors of SunLine Services Group at a regular meeting held on \_\_\_\_\_ day of \_\_\_\_\_, 2025.

\_\_\_\_\_  
Nancy Ross  
Chairperson of the Board

ATTEST:

\_\_\_\_\_  
Vanessa Ordorica  
Clerk of the Board

APPROVED AS TO FORM:

\_\_\_\_\_  
Catherine Groves  
General Counsel

**EXHIBIT A: TAXICAB SERVICE ORDINANCE**

**CHAPTER ONE**

**ARTICLE I  
PERMITTING OF TAXICAB BUSINESSES AND DRIVERS**

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- 1.015 Definitions and Statutory References
- 1.020 Taxi Administrator
- 1.025 Delivery of Notices or Requests
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- 2.035 Fines and Penalties



## **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. "E-Hail Application" means an application that allows customers to electronically order a permitted taxicab on demand using a smartphone or other mobile or electronic device and/or accept payment for those trips.
- 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 1<sup>st</sup> of each year and expiring June 30<sup>th</sup> 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 a valid California Class C or Commercial Class A Driver's License;
  5. Provide proof of completion for taxi business's driver safety education and training program;
  6. Provide proof of completion for taxi business's disabled access education and training program;
  7. 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;
  8. Provide SSG with a copy of the Department of Motor Vehicles Pull Notice Program enrollment, as defined in Vehicle Code Section 1808.1; and
  9. 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 1<sup>st</sup> of each year and expiring June 30<sup>th</sup> 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. For trips originating at either the Palm Springs International Airport or Acrisure Arena, a Permittee may charge customers a maximum flat fare of \$25, inclusive of any airport fees. A trip that exceeds four (4) miles will be charged at the meter rate after the maximum flat fare has been charged, beginning at the fourth mile.
- C. A Permittee may utilize an E-Hail Application to provide upfront fare estimates based on the trip distance and time (E-Hail Application Based Fare). An E-Hail Application-Based Fare may not exceed the maximum rates authorized by Section 1.070.A.
- D. A Permittee may charge customers an upfront flat rate fare through a transportation network company (TNC) E-Hail Application, such as Uber (Upfront Fare Program). Fares under the Upfront Fare Program must use dynamic pricing established by the TNC application(s) using an algorithm to calculate the upfront fare based on the trip distance and time. Meter rates cannot be applied to Upfront Fare Program trips. Section 1.070.A does not apply to the Upfront Fare Program.
- E. 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.
- F. The Board may from time to time establish maximum flat rates for special events or fixed routes.
- G. A special music festival venue surcharge of \$35 may be charged by Permittees for trips originating at the Coachella Valley Music and Arts Festival or at the Stagecoach Festival. The special music festival venue surcharge is effective only for days on which the respective music festivals occur. This special music festival venue surcharge is in addition to any metered rate.
- H. 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.
- I. The Permittee shall disclose fares, fees or rates to the customer as provided for in Government Code Section 53075.5.

- J. 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.4<sup>th</sup> 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. Proposed trips that are part of the Upfront Fare Program, are considered accepted once the Driver has accepted the TNC application trip offer. If the offer accepted and then rejected, it is considered a ride refusal and subject to citation and applicable fine, unless the ride rejection is based on one or more of the exceptions set forth in Section 2.020.L.
- L. A Driver may only refuse to serve a person requesting the service of their taxicab if:
  1. The Driver has already been dispatched on another call;
  2. The passenger is engaging in physical or verbal mistreatment, including hitting, kicking, gestures, yelling, spitting, threats, intimidation, assaults, slurs, or cursing, or otherwise causing the driver to reasonably believe that the driver's health or safety, or that of others may be endangered. Discriminatory-based ride refusals are prohibited and may result in permit revocation;
  3. The passenger cannot, upon request, show ability to pay the fare;
  4. The passenger refuses to state a specific destination upon entering the taxicab; or
  5. The proposed trip is outside Riverside County.

A Driver refusing service under this section must immediately record the reason(s) for the service refusal with their dispatcher and the taxicab company dispatcher is required to maintain a written record of all service refusals.

A ride that is in the process of being completed, but which is refused under this provision, must be terminated at a safe, well-lit location, near a location where the passenger will have the ability to reasonably obtain an alternate form of transportation. In emergency situations, a driver may immediately refuse a ride and contact the police for further assistance.

- M. 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.
- N. 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.
- O. 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.
- P. 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.
- Q. 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:** March 26, 2025 **ACTION**

**TO:** Board of Directors

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

**RE:** Approve 2025 State and Federal Legislative Program

---

### Recommendation

Recommend that the Board of Directors (Board) approve the 2025 State and Federal Legislative Program.

### Background

SunLine Transit Agency (SunLine) depends significantly on operating and capital funding from the state and federal government, making legislative actions at these levels crucial to its operations. SunLine is committed to enhancing the accessibility, sustainability, and efficiency of public transportation in the Coachella Valley. To support this mission, SunLine has developed a comprehensive 2025 Legislative Program focused on advocating for policies and securing funding at both the state and federal levels. The program aims to address key issues such as transit funding, sustainability initiatives, public safety, universal access, and economic development while aligning with SunLine's vision of providing sustainable, common sense transportation solutions.

The draft 2025 Legislative Program was presented to the Finance/Audit and Board Operations Committees at the December 4, 2024 meeting, as a discussion item to solicit feedback. The revised program is now being presented to the full Board for approval.

At the state level, SunLine will focus on protecting allocations from the Transportation Development Act (TDA) and advocating for reforms to improve the distribution of these funds. Efforts will also target securing grants for necessary infrastructure investments, job creation and retention, and fleet modernization initiatives; improving universal access to transit for all communities, and; supporting legislation that enhances transit worker safety. These initiatives reflect SunLine's commitment to meeting the growing and evolving demands of the Coachella Valley.

At the federal level, SunLine will advocate for the re-authorization of the Infrastructure Investment and Jobs Act (IIJA), which includes significant funding for transit programs. SunLine will pursue opportunities to apply for federal grants to improve and expand infrastructure to support operations and growing demand for transit services. SunLine

will also support legislation that incentivizes the use of public transit, promotes technology innovation and development, and enhances development around key transit hubs/services. Workforce development remains a core focus, and SunLine is committed to supporting legislation that increases resources for training programs and addressing industry labor shortages and skill gaps. Additionally, SunLine will advocate for policies that prioritize public safety, including legislation to increase penalties for assaults on transit workers and support for health and wellness initiatives.

The Legislative Program includes a proactive action plan involving strategic partnerships, advocacy efforts, and targeted outreach. SunLine will work closely with local, state, and federal legislators, as well as regional governments, environmental groups, and business organizations, to build a broad coalition of support for transit-friendly policies. Activities will include monitoring legislation, meeting with key stakeholders, and advocating for specific legislation through letters of support or opposition. Through these efforts, SunLine aims to ensure continued leadership in sustainable transit while supporting policies that benefit the residents and visitors of the Coachella Valley.

### **Financial Impact**

There is no financial impact.

### **Performance Goal**

**Goal 2: Highly Trusted Mobility Solutions** – Ensure advocacy for SunLine’s priorities and policies that support the Agency’s mission, ensuring sustainable funding, and enhancing the Agency’s ability to adapt to evolving transportation needs.

Attachment:

- [Item 13a](#) – 2025 State and Federal Legislative Program

### **In Collaboration with:**

Luis Garcia, Chief Financial Officer  
Shaw Yoder Antwih Schmelzer & Lange (SYASL)

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

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





# 2025

## STATE AND FEDERAL LEGISLATIVE PROGRAM



## 2025 STATE AND FEDERAL LEGISLATIVE PROGRAM

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### OVERVIEW

SunLine Transit Agency (SunLine) was established in 1977 to provide public transportation to the Coachella Valley. SunLine offers a range of services including fixed-route buses, paratransit, and micro-transit. SunLine serves the cities of Desert Hot Springs, Palm Springs, Cathedral City, Rancho Mirage, Palm Desert, Indian Wells, La Quinta, Indio, Coachella, and six unincorporated communities (Thousand Palms, Bermuda Dunes, Thermal, Mecca, Oasis, and North Shore) within Riverside County.

SunLine's mission is to provide safe and environmentally conscious public transportation services and alternative fuel solutions to meet the mobility needs of the Coachella Valley. As a pioneer in hydrogen fuel cell technology and clean energy transit solutions, SunLine leads the industry in sustainability. SunLine's services significantly reduce traffic congestion, promote environmental health, and ensure mobility for residents and visitors alike, fostering stronger, more connected communities.

### SUNLINE'S LEGISLATIVE PROGRAM

The purpose of the Legislative Program is to advocate for policies and secure funding that enhance the efficiency, sustainability, and accessibility of public transportation in the Coachella Valley, including regional efforts like the 10 Commuter Link, which connects communities outside the Coachella Valley and expands transit accessibility, linking residents to job centers in Riverside, San Bernardino, as well as educational institutions like California State University, San Bernardino (CSUSB). Through strategic partnerships and proactive engagement with local, state, and federal stakeholders, the program advances initiatives that align with SunLine's commitment to community connectivity, job creation and economic vitality, and innovation. By focusing on these priorities, the Legislative Program enables SunLine to effectively respond to emerging transportation trends and address regulatory challenges, strengthening SunLine's position as a leader in sustainable transit.

Key elements of the Legislative Program include securing dedicated funding sources, advocating for legislation that supports transit needs, funding opportunities to support workforce development initiatives that strengthen the transit industry, and removing statutory and regulatory barriers to implementing innovative and environmentally responsible transit solutions. By building strong relationships with policymakers, SunLine can shape policies that support efficient transit operations while addressing community goals such as economic growth and environmental awareness. This approach ensures that SunLine remains adaptable to the

evolving needs of the Coachella Valley, maintaining public transportation as a reliable and universally accessible resource for all residents.

## **STATE LEGISLATIVE PROGRAM**

This program focuses on key priorities which include advocating and protecting allocations from the State Transit Assistance (STA), Local Transportation Funds (LTF), and Cap-and-Trade while also pursuing additional funding opportunities through various state programs. SunLine will actively monitor regulatory changes and funding trends to identify emerging opportunities that could positively impact funding allocations and support SunLine's operational goals. The program will also focus on advancing legislation that improves transit access for underserved communities, fosters clean transportation infrastructure development, and enhances partnerships with state agencies to address mobility needs, reduce emissions, and strengthen the efficiency and sustainability of transit services in the Coachella Valley.

### **i. Transit Funding and Sustainable Transportation Initiatives**

- a. Reform the Transportation Development Act (TDA) to improve the metrics and distribution of TDA funds.
- b. Oppose legislation that seeks to expand the use of TDA funds to non-transit purposes beyond those allowed by current statute.
- c. Strategically apply for state grants to improve and expand transit facilities, such as bus stops, maintenance yards, and transit hubs.
- d. Pursue dedicated funding for zero-emission transit vehicles and facilities.
- e. Advocate for additional Cap-and-Trade funding dedicated to transit capital and operations.
- f. Advocate for additional funding for paratransit operations and transit accessibility capital improvements.
- g. Monitor and engage on legislation impacting the price of hydrogen and electricity as fuel sources for transit agencies.
- h. Support legislation to enhance transit-oriented development, integrating public transportation with affordable housing projects.

- i. Support state and other governmental agency efforts that help address issues of climate change.
- ii. **Equitable Access and Affordability**
  - a. Support legislation that ensures all communities, including rural and underserved areas, have access to reliable transit services.
- iii. **Public Safety and Health**
  - a. Advocate for policies that prioritize the safety of riders and operators, including anti-harassment measures, stronger trespass prohibitions, and improvements in lighting and security at transit stations.
  - b. Promote initiatives that integrate health awareness, like heart-healthy programs, into the transit system's outreach efforts.
  - c. Oppose legislation or regulations that would have an adverse impact on transit agencies' ability to provide safe transportation.
  - d. Support legislation that promotes employee safety, including higher penalties for assaults on transit workers.
- iv. **Economic and Workforce Development**
  - a. Encourage legislation that supports the creation of jobs in the transit sector, including training programs for new technologies.
  - b. Support increasing resources to recruit, retain, and train SunLine employees.
  - c. Pursue dedicated funding opportunities for workforce development programs to address industry labor shortages and advance employee skills.
  - d. Support measures that promote transit as a key component of economic development in the Coachella Valley, attracting businesses and tourism.

## **FEDERAL LEGISLATIVE PROGRAM**

This program focuses on securing funding and advancing policies that support the expansion of sustainable energy transit solutions and improve public transportation services. Key priorities include advocating for continued funding such as Federal Transit Administration (FTA) grants, USDOT BUILD (Better Utilizing Investments to Leverage Development) Grants, and the Low or No Emission Vehicle Program (Low-No Program).

i. **Transit Funding and Sustainable Transportation Initiatives**

- a. Support an increase in formula and grant programs for transit services through a re-authorization of a federal transportation act following the expiration of the Infrastructure Investment and Jobs Act (IIJA) on September 26, 2026.
- b. Advocate for a year-long FY26 Appropriations bill that ensures funding levels at or above FY25 levels.
- c. Strategically apply for federal grants to improve and expand transit facilities, such as maintenance facilities, fueling stations, job training centers, and transit hubs.
- d. Monitor developments related to PEPR and Section 13(c) and support actions that ensure the preservation of transit funding for transit agencies.
- e. Advocate for transit agencies to serve as direct recipients of federal grant funding and minimize unnecessary bureaucratic processes.
- f. Advocate for funding and policies supporting technology innovation and development.
- g. Promote legislation and streamlined regulatory mandates that support common sense infrastructure development for meeting operational needs.
- h. Advocate for increased local control and flexibility in project delivery.
- i. Support efforts to stabilize the Highway Trust Fund.
- j. Advocate for a permanent extension of the alternative fuels excise tax credit.
- k. Support legislation that incentivizes the use of public transit.
- l. Support legislation to enhance transit-oriented development, integrating public transportation with affordable housing projects.

ii. **Universal Access**

- a. Support legislation that ensures all communities have access to reliable transit services.

iii. **Public Safety and Health**

- a. Advocate for policies that prioritize the safety of riders and operators, including anti-harassment measures and improvements in lighting and security at transit stations.

- b. Promote initiatives that integrate health awareness, like heart-healthy programs, into the transit system's outreach efforts.
- c. Oppose legislation or regulations that would have an adverse impact on transit agencies' ability to provide safe transportation.
- d. Support legislation that promotes employee safety, including higher penalties for assaults on transit workers.

iv. **Economic and Workforce Development**

- a. Encourage legislation that supports the creation of jobs in the transit sector, including training programs for new technologies.
- b. Support increasing resources to recruit, retain, and train SunLine employees.
- c. Pursue dedicated funding opportunities for workforce development programs to address industry labor shortages and advance employee skills.
- d. Support measures that promote transit as a key component of economic development in the Coachella Valley, attracting businesses and tourism.

**STRATEGIC PARTNERSHIPS AND ADVOCACY**

To achieve the goals of SunLine Transit Agency's Legislative Program, the following advocacy activities and resources will be utilized.

- i. Develop relationships with local, state, and federal legislators and administration officials who can champion transit issues.
- ii. Collaborate with local governments, community organizations, environmental groups, and business leaders to build a broad base of support for transit-related legislation and administrative actions.
- iii. Strategic travel to meet with federal and state legislators and agencies.
- iv. Monitor and track relevant legislation at the state and federal levels, identifying opportunities for advocacy and bring relevant legislation to the Board of Directors for feedback, support, or opposition.
- v. Active participation in the California Transit Association's State Legislative Committee.
- vi. Active participation in the American Public Transportation Association's Legislative Affairs Committee.

- vii. Active participation in the Greater Coachella Valley Chamber of Commerce Legislative Committee.
- viii. Proactive outreach to legislators to sponsor transit-friendly legislation.
- ix. Collaboration with media outlets to publish transit-supportive materials.
- x. Ongoing communication with SunLine's state and federal legislative consultants.
- xi. Review of legislative updates from trade organizations and transportation agencies.
- xii. Coordination with regional transportation agencies to strengthen local advocacy efforts.
- xiii. Attendance at relevant seminars and conferences to stay informed of current developments.
- xiv. Launch initiatives to raise public awareness about the importance of public transit, focusing on its environmental, economic, and social benefits.

## SunLine Transit Agency

**DATE:** March 26, 2025 **DISCUSSION**

**TO:** Board of Directors

**FROM:** Greg Wildman, Chief of Strategic Alignment

**RE:** Draft Vision and Mission Statement and Strategic Plan

---

### **Background**

In February 2024, with the assistance and guidance of Insight Strategies, Inc. (Insight), SunLine Transit Agency (SunLine) began a year-long initiative to develop an updated Strategic Plan (EXHIBIT A), which included new vision and mission statements around which the Plan was shaped. Before proceeding forward with finalizing the Plan, staff is seeking feedback from the Board and members of the public.

### ***Overview of Strategic Plan Development Process***

To develop the draft Strategic Plan, Insight conducted in-person workshops with the Agency leadership, including the General Manager, department chiefs, and middle managers, which occurred nearly monthly over the past year. Furthermore, the Board of Directors (BOD) and all represented/non-represented employees were given the opportunity to participate in the development process through focus groups, interviews, as well as an Agency-wide survey. Overall, the process involved:

- Conducting an agency-wide survey process which provided an understanding of SunLine’s culture, leadership capacity, and employee perspectives of the Agency’s direction, priorities, strengths, and opportunities for growth/improvement and culminated in and Organizational & “Voice of the Employee” (VOE) Assessment report;
- Brainstorming and analyzing key elements of the agency’s purpose, leadership competencies, performance expectations, and organizational values;
- Drafting a new vision and mission statement that reflect SunLine’s core purpose and responsibilities to the communities served by the Agency;
- Establishing strategic priorities, measurable goals, and execution plans, on which the draft strategic plan is built, which tie back to Agency’s vision, mission and values.



## ***Vision and Mission Statements***

Historic and current work conducted by staff influenced the development of the draft vision and mission statements. As the public transit provider for the Coachella Valley (CV), SunLine's primary responsibility is to deliver efficient fixed route and complementary paratransit, per state and federal requirements, that effectively meet the mobility needs of CV citizens. Essentially, transporting citizens to meet life needs is SunLine's top priority. To the extent that other resources are available, SunLine provides other services and investments to minimize mobility gaps and further other community interests such as operating clean air technology. To this latter point, SunLine has taken progressive steps to lead the transit industry in the implementation of clean transportation solutions and, more recently, hydrogen powered technology. As a result, the following mission and draft vision statements were established, and the elements of the draft Strategic Plan tie back to them.

**Mission (purpose/SunLine's "why"):** Connecting people and improving life by taking you from where you are to where you want to be.

**Vision (aspirational future state):** Fueling the well-being of our community, SunLine's journey of innovation is to save the sunrise where every mile contributes to a cleaner, greener tomorrow.

## ***Voice of the Employee***

To establish and implement an effective Strategic Plan that was embraced by all members of the organization from the Board to our frontline employees, it was important to solicit and document the thoughts of SunLine's employees. Focus groups and listening sessions, consisting of select represented and non-represented employees from every department worked with Insight to establish survey categories and questions around culture, communication, and leadership. Survey and interview processes were then executed in the fall of 2024.

Between June and October 2024, over 100 employees participated in one-on-one interviews and focus groups, and 42 employees participated in the written assessment. Members of the Board of Directors also participated in the process. Insight consolidated the findings from the information gathering sessions into a report/PowerPoint presentation that was then presented to our team of employees in our Transportation/Operations, Maintenance and Administration departments.

The report identified key agency strengths, ranging from its flexibility and adaptability to multiple changes and disruptions employees were experiencing, to the perception that employees possess a strong team mentality and connections to their teams. Opportunities for improvement included the need to leverage leadership visibility, communication and follow-through, to improving communication throughout the agency and engaging the workforce in critical decision-making processes. (An overview of the

report was provided in the January 2025 General Manager's Report in the board packet.)

### ***Strategic Plan Elements***

The data in the VOE report was used to inform the development of the following Strategic Priorities:

1. Service Reliability
2. Customer Experience
3. Environmental Impact
4. Safety and Security
5. People/Workforce
6. Resource acquisition, allocation and management.

Other elements of the draft Strategic Plan involved the development and refinement of associated Strategic Goals for each of the Strategic Priorities. Staff is then responsible for developing more specific execution plans for carrying out the Strategic Priorities and Goals.

Throughout the Strategic Plan development process, Insight facilitated workshops that challenged leadership to identify and prioritize the most critical areas needing to be addressed and craft meaningful goals and workplans designed to achieve desired outcomes. Insight also pushed staff to consider organizational values that ensure behavioral expectations accompany the execution plans, and annual reviews of the Strategic Plan elements. In addition, to ensure accountabilities are clear from the strategic level on down to each individual, a process has begun to revamp SunLine's performance management process.

### **Financial Impact**

There is no financial impact for presenting the draft Strategic Plan for Board and public consideration and feedback.

### **Performance Goal**

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

**In Collaboration with:**

Mona Babauta, CEO/General Manager  
Executive Team  
Supervisors and Managers

**Approved/Reviewed by:**

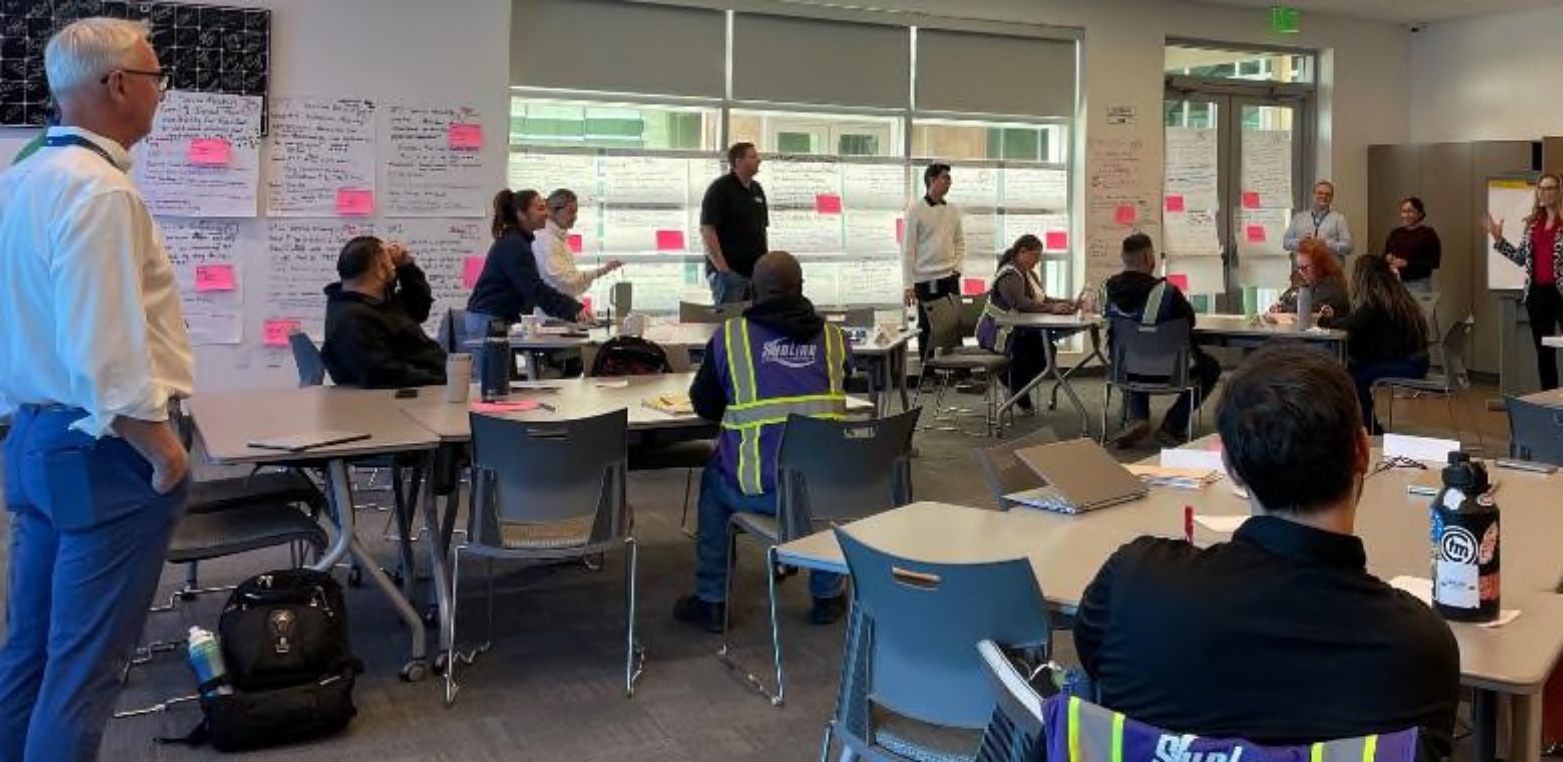
Mona Babauta, CEO/General Manager  
Catherine J. Groves, General Counsel

Attachments:

- [Item 14a](#) – PowerPoint Presentation

# SunLine Board of Directors Presentation March 26, 2025





# Insight's from the Top







INSIGHT  
STRATEGIES, INC.



# Why Insight Strategies?





# Insight's Transit/Transportation/Mobility Clients (65+!)





# Meet the Insight Strategies Team



**Teri Fisher,**  
CEO & Managing Partner



**Kevin Catlin,**  
President & Managing Partner



**Catie**



**Shari**



**Ozzie**



**Joseph**



**Larnzell**



**Janea**



**Mike**



**Leslie**



**Curtis**



**Randall**



Page 13 of 33  
**Claire**



**Kim**



**Sean**



**Alesia**



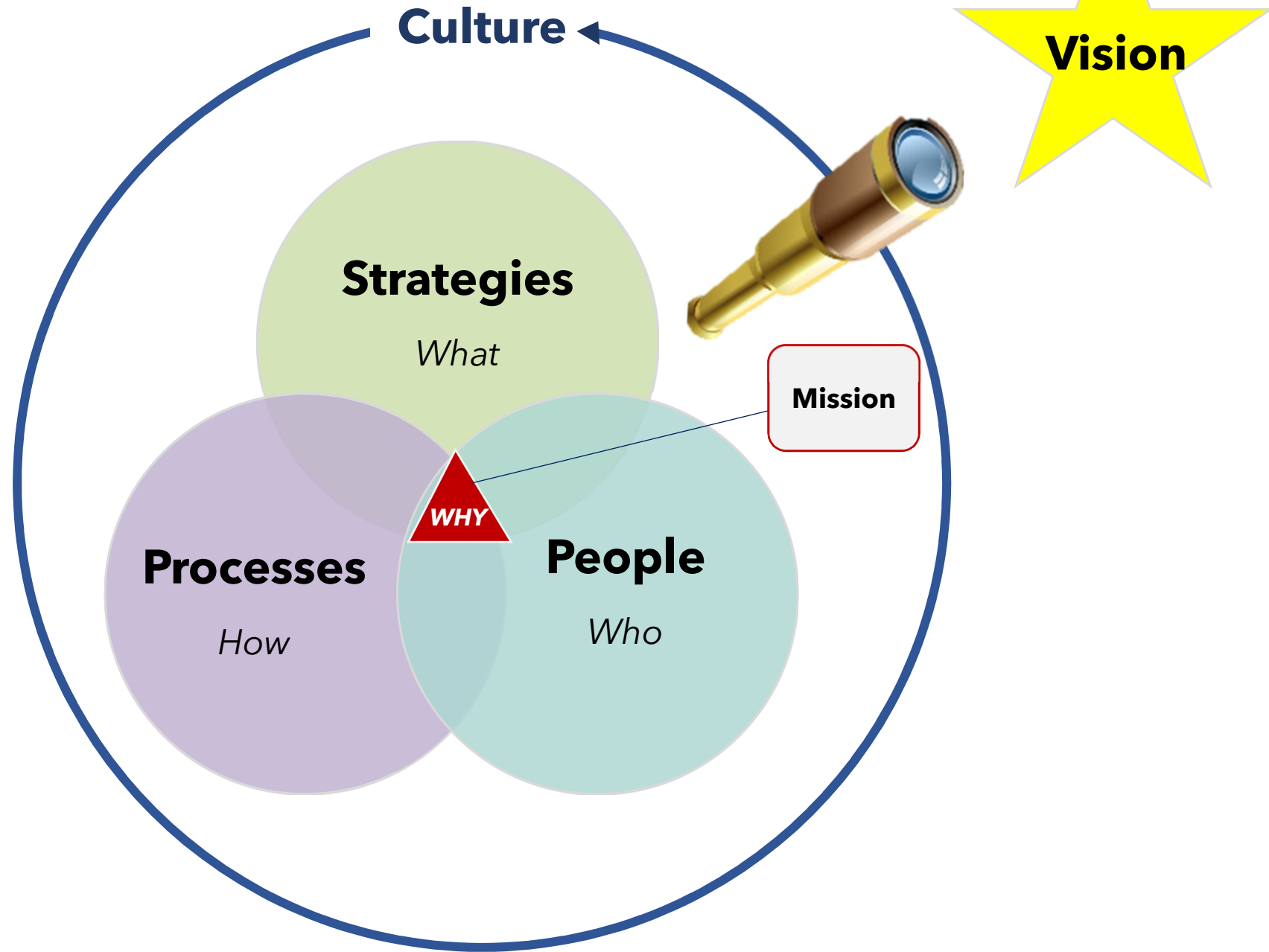
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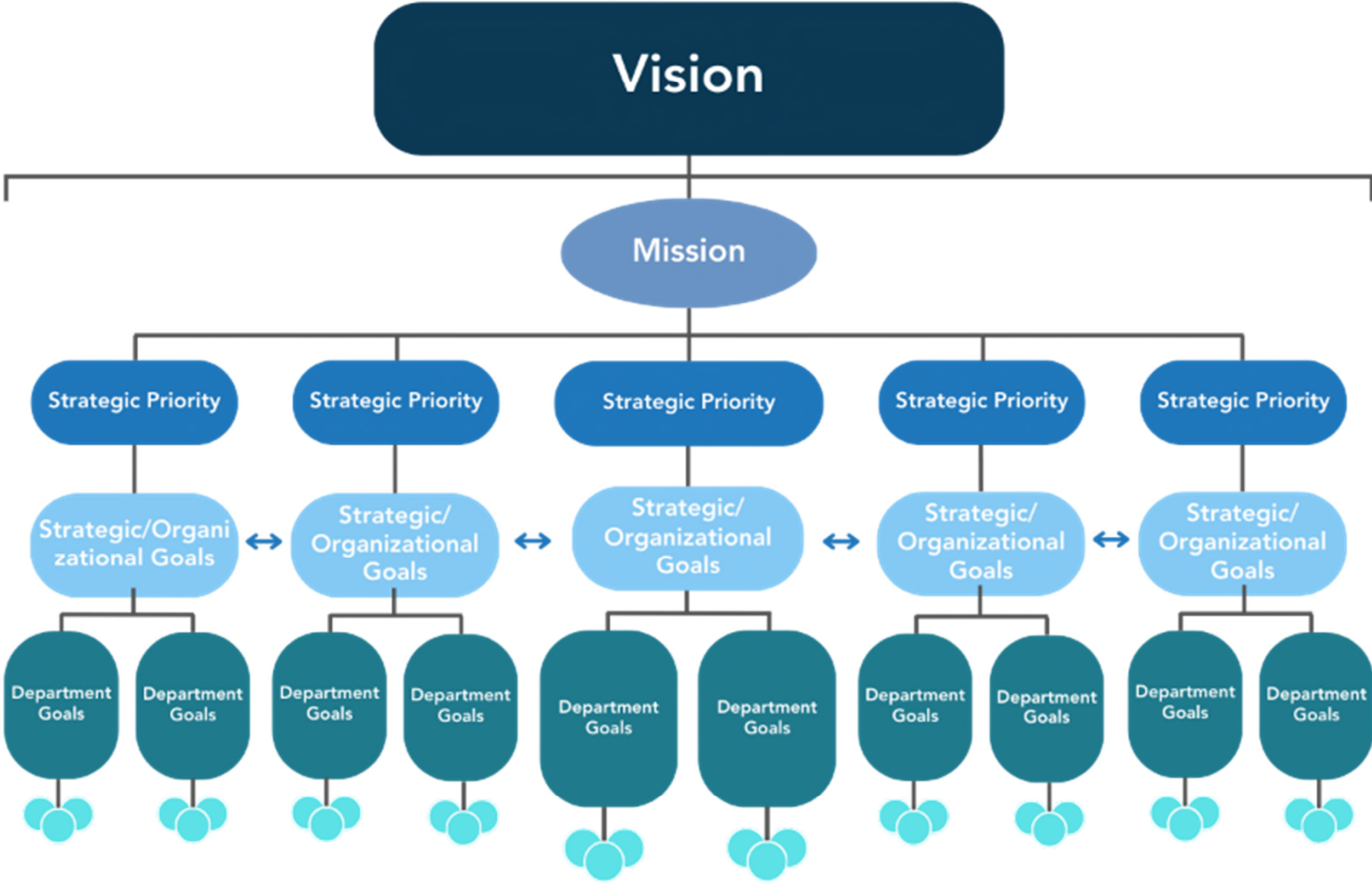


**Insight Strategies,  
Inc.**

**Organizational  
Health  
& High-Performance  
Framework®**



# Insight Strategies Goal Cascading Framework©



 = Individual SMART Performance Goals

 = Cross-Functional Interdependencies

# Components of the Strategic Planning Process



**Conduct a Voice of the Employee Assessment  
(Listening Session/Focus Groups and  
Employee Survey)**



**Develop SunLine's Mission, Vision, and Values**

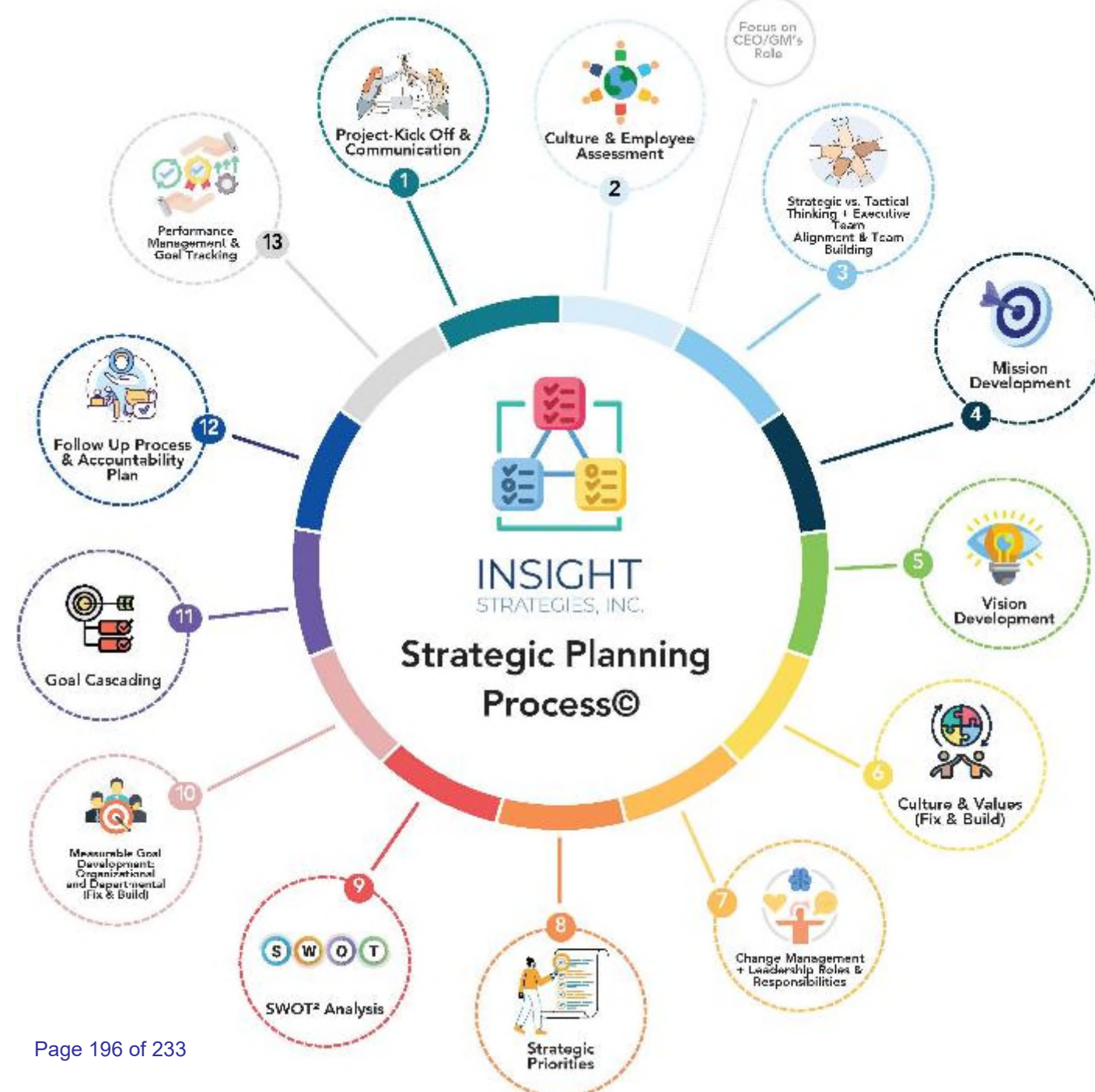


**Develop an Agency Strategic Plan**



**Begin a Performance Management Renovation  
Process**

# Insight's Strategic Plan Framework©





# Quick Wins



## Roadshows

- **Enhancing Communication & Transparency**
- **Aligning Teams & Reinforcing Company Vision**
- **Fostering a Sense of Community**
- **Boosting Trust in Leadership**
- **Driving Organizational Change & Adaptability**
- **Providing Learning & Growth Opportunities**

## Snack Talk

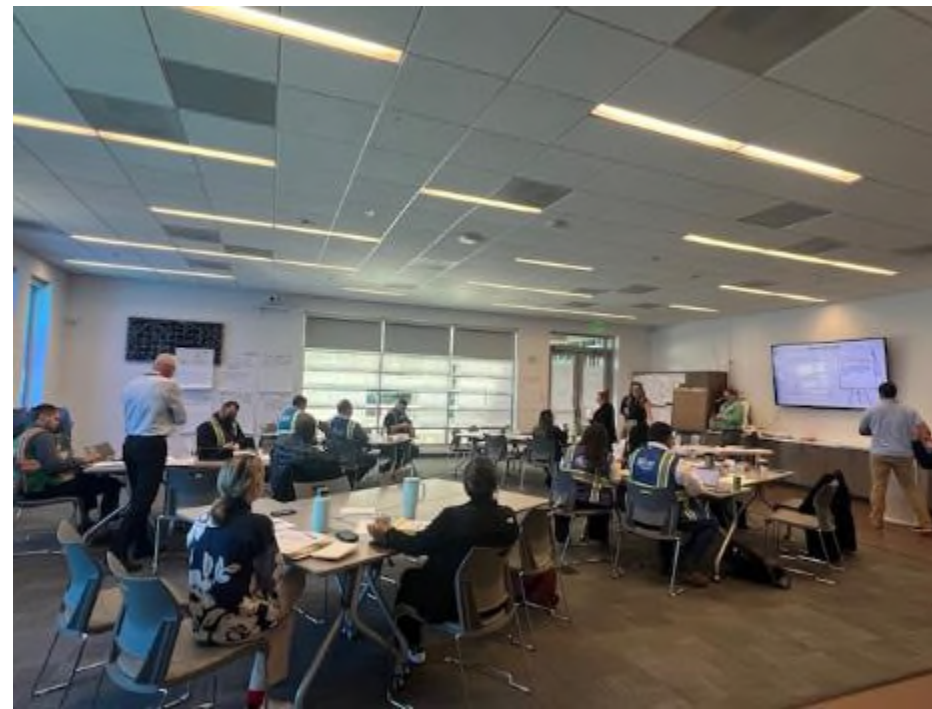
- **Building Relationships**
- **Open Communication**
- **Team Morale**
- **Idea Generation**
- **Company Culture**
- **Information Sharing**

## Transit Talk Newsletter

- **Boosting Employee Engagement & Morale**
- **Encouraging Collaboration & Teamwork**
- **Reinforcing Company Culture & Values**
- **Improving Productivity & Efficiency**
- **Supporting Employee Development**
- **Strengthening Leadership Connection**
- **Reducing Email Overload**



**On a personal note...**





A futuristic bus is shown in a desert landscape at sunset. The scene is filled with palm trees, cacti, and a cityscape in the distance. The sky is a mix of orange and purple, with glowing purple lines and a lens flare effect. The bus is white and has a sleek, modern design. The text is overlaid on a semi-transparent dark rectangle in the center of the image.

# **SunLine's NEW Mission Statement**

*Connecting people, improving  
life by taking you from where  
you are to where you want to be*



A stylized illustration of a sunrise over a road lined with palm trees. A bus and a car are visible on the road. The sun is a large, stylized circle with horizontal lines, partially obscured by the trees. The overall color palette is warm, with oranges, yellows, and blues.

# **SunLine's *PROPOSED*** **Vision Statement**

*Fueling the well-being of our community, SunLine's journey of innovation is to save the sunrise where every mile contributes to a cleaner, and greener tomorrow*

# SunLine's Strategic Priorities



**Service Reliability**



**Customer Experience**



**People / Workforce**



**Environmental Impact**

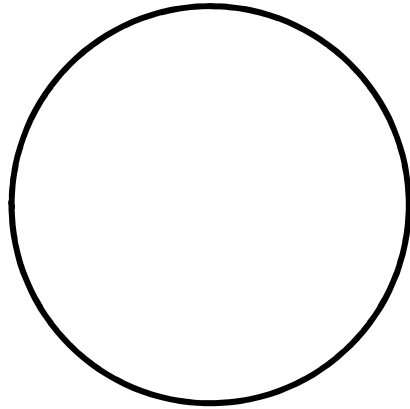


**Safety & Security**



**Resource acquisition, allocation,  
and management**

# Strategic Priority Definition

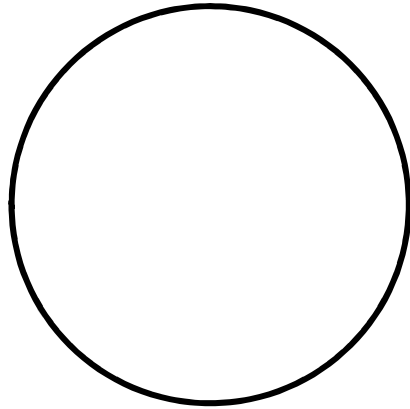


## **Service Reliability**

- Our commitment to service reliability centers on building ridership trust by-delivering a seamless transit experience and being there when we say we're going to be there.

- What's best for the Agency
- Reputation and branding
- 3-5 year horizon
- Long term health of the agency
- Regulatory compliance
- Align with mission and vision

# Strategic Priority Definition

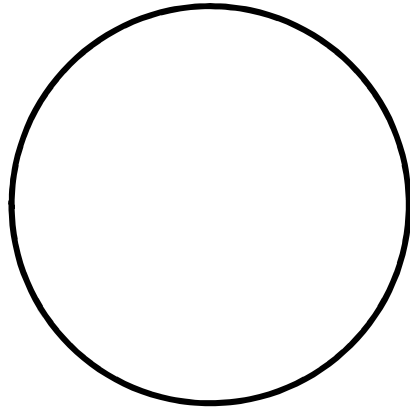


## Customer Experience

- Our customer experience commitment focuses on all aspects of the customer's journey with an emphasis on achieving respectful, timely, and accessible service.

- What's best for the Agency
- Reputation and branding
- 3-5 year horizon
- Long term health of the agency
- Regulatory compliance
- Align with mission and vision

# Strategic Priority Definition

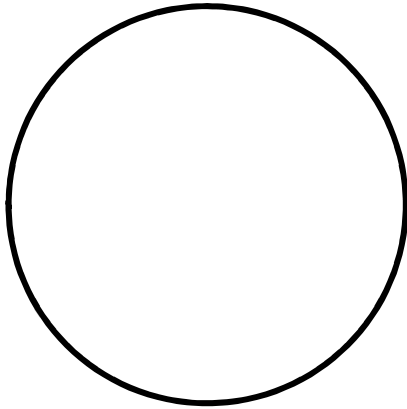


## Environmental Impact

- We are committed to reducing our carbon footprint by working closely with SunLine Transit Operations to support sustainable initiatives and by implementing green energy solutions.

- What's best for the Agency
- Reputation and branding
- 3-5 year horizon
- Long term health of the agency
- Regulatory compliance
- Align with mission and vision

# Strategic Priority Definition

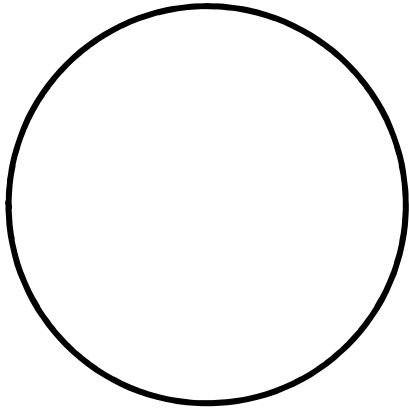


## Safety & Security

- Our safety and security commitment focuses on protecting staff and riders within the SunLine system, creating a culture of safety that protects our communities, while minimizing risk and ensuring accountability to safety and security exists at all levels.

- What's best for the Agency
- Reputation and branding
- 3-5 year horizon
- Long term health of the agency
- Regulatory compliance
- Align with mission and vision

# Strategic Priority Definition



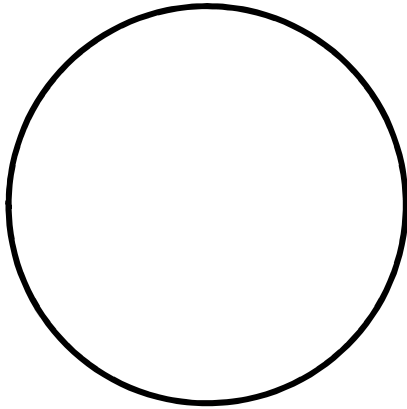
## People / Workforce

- Our workforce strategy emphasizes fostering a culture that aligns with our vision, growing and creating opportunities for staff to realize their fullest potential, and maintaining staffing levels to meet the needs of our organization and customers effectively.

- What's best for the Agency
- Reputation and branding
- 3-5 year horizon
- Long term health of the agency
- Regulatory compliance
- Align with mission and vision



# Strategic Priority Definition



- What's best for the Agency
- Reputation and branding
- 3-5 year horizon
- Long term health of the agency
- Regulatory compliance
- Align with mission and vision

## Resource acquisition, allocation, and management

- Our resource management commitment prioritizes optimized resource management by effectively acquiring and allocating financial, human, and material resources to ensure operational excellence and long-term sustainability. We emphasize the importance of organizational accountability and responsibility in stewarding public funds, fostering transparency and trust in how resources are utilized to serve our community.

# SunLine Transit

## Strategic Plan

2025



[www.InsightStrategies.com](http://www.InsightStrategies.com)

# SunLine Transit's Leadership Competency Expectations

**1) Strategic Vision and Culture**

**2) Champions and Encourages Change**

**3) Politically Astute and Organizational Savvy**

**4) Builds Effective Teams**

**5) Character**

**6) Coaches and Develops Staff + Develops Leaders with Succession in Mind**

**7) Communicates Effectively**

**8) Motivates, Inspires, and Drives Engagement at All Levels**

**9) Decision Quality & Decisiveness**

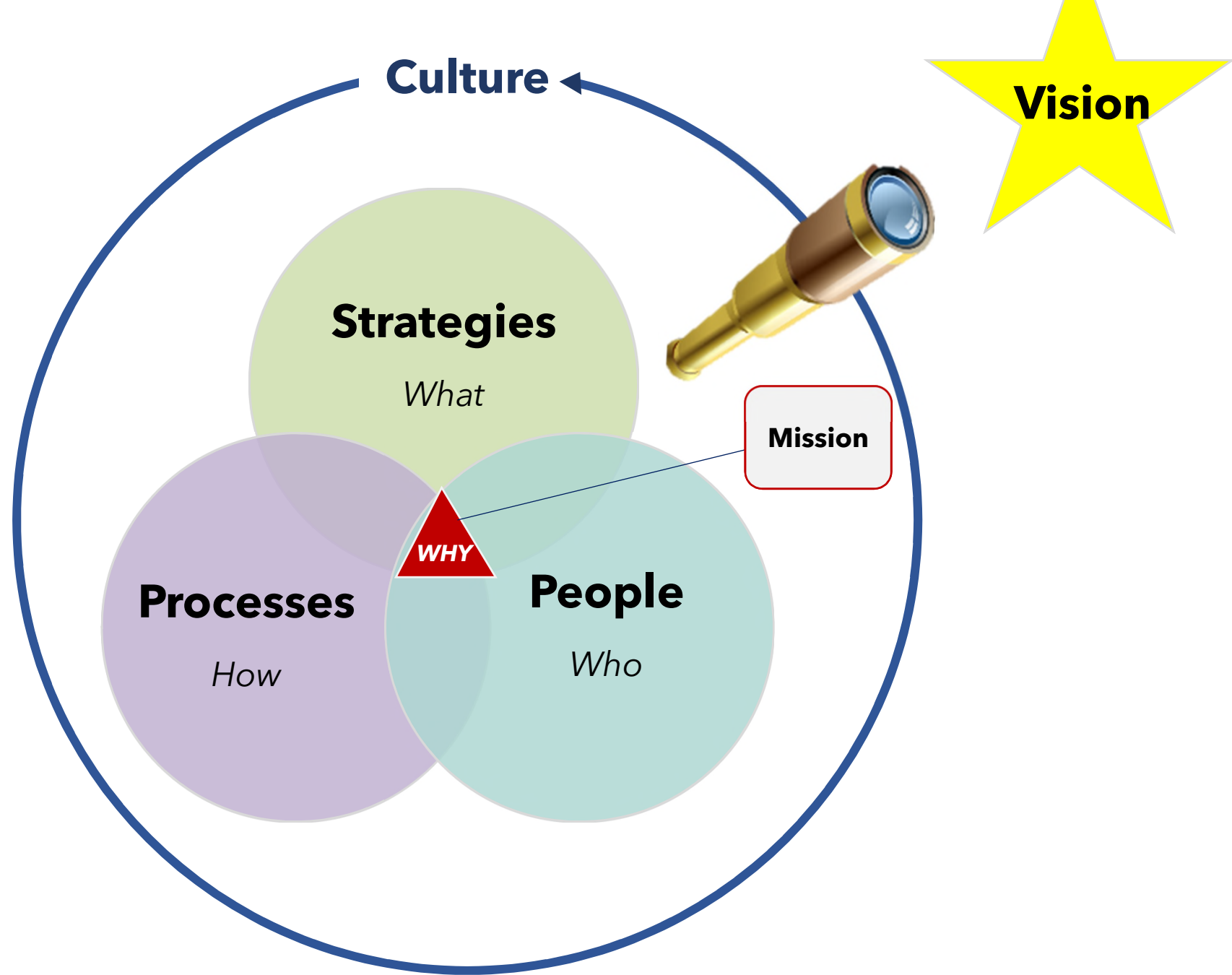
**10) Personal Accountability to Results - Seeks Solutions**

**11) Tough-minded and Resilient**

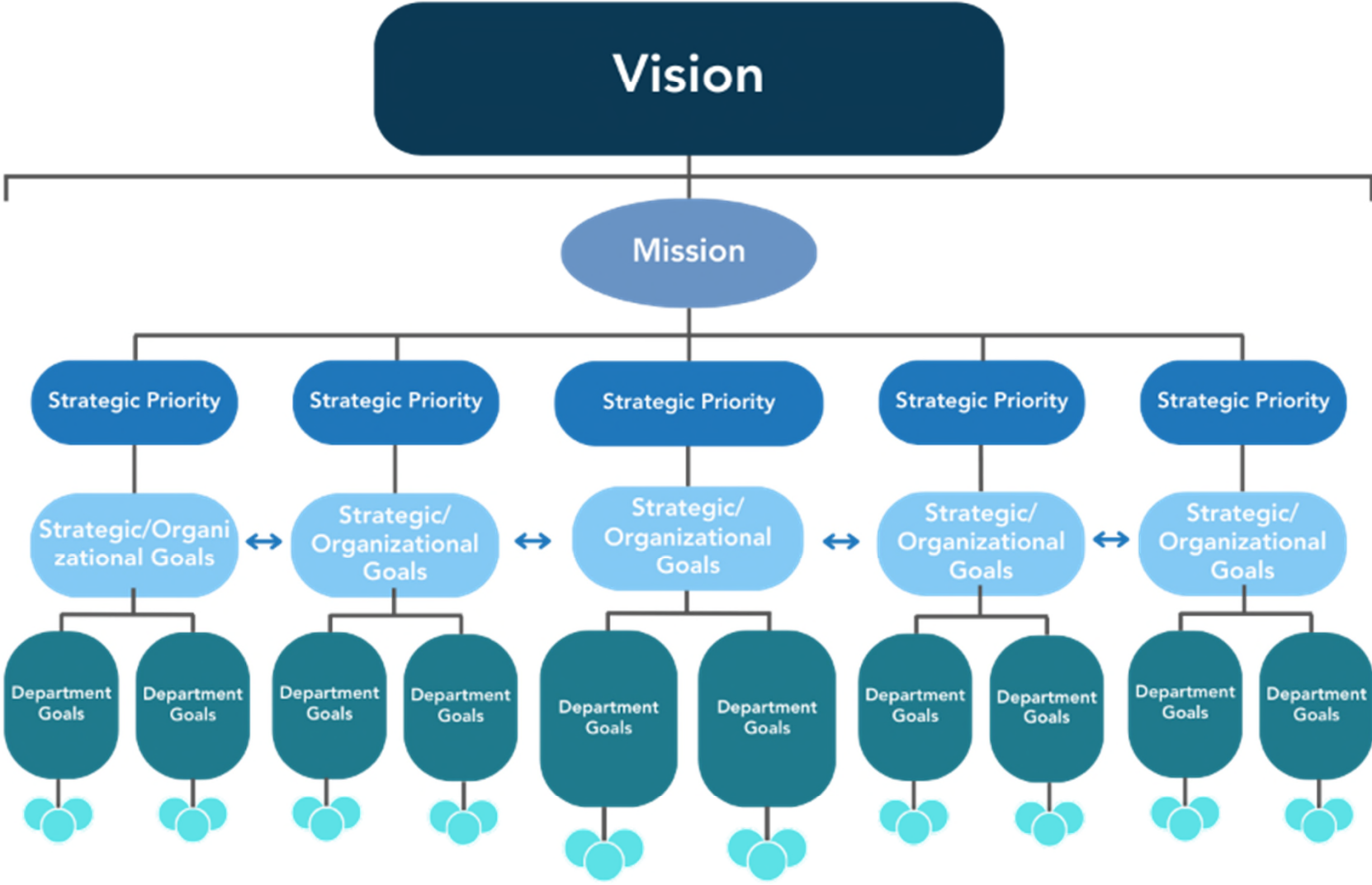
**Insight Strategies,  
Inc.**

**Organizational  
Health  
& High-Performance  
Framework®**

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# Insight Strategies Goal Cascading Framework©



 = Individual SMART Performance Goals

 = Cross-Functional Interdependencies

# Performance Management Project Team

*Who was involved in the assessment and recommendations*

- Mona Babauta
- Tamara Miles
- Greg Wildman
- Ray Stevens
- Teri Fisher





# Where Strategic Planning Meets Performance Management

Why is it critically important?

- The process hadn't been reviewed or refreshed in 10+ years
- PM anchors the strategic plan to individual and measurable accountabilities – the process for holding people accountable to accomplishing the goals



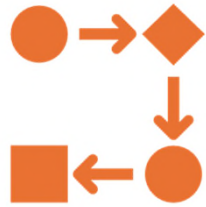
# Performance Management Process Components

- In collaboration with the Project Team, administer a comprehensive assessment of the current state of SunLine's Performance Management Process
- Make recommendations
- Implement the recommendations



# Comprehensive Assessment: Insight's Common Performance Management Dilemmas within Transit/Transportation/Mobility

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**Process**



**Ratings**



**Feedback**

# Insight's Common PM Dilemmas within Transit/Transportation/Mobility Process

- Manual process vs. utilizing technology – yes it exists but not being fully utilized
- Ease of use – technology tool that's too arduous/ ineffective, or doesn't exist
- Unstructured or inconsistent approach to Performance Management – turns in on time.
- Self-evaluations aren't part of the process
- Process hasn't been reviewed / refreshed / updated in years
- Lack of measurable performance goals (not SMART)
- Leaders not meeting deadlines + correlating impacts therein
- Passing around underperformers vs. taking accountability measures through PIP – improved since Mona. Also, expectations higher with Mona. Wants employees to grow – push them.
- PIP Process doesn't exist or not utilized consistently as an accountability tool – *not identifying them from the beginning*

# Insight's Common PM Findings within Transit/Transportation/Mobility

## Ratings

- A possible desired merit adjustment drives the rating (vs. performance driving the rating) – currently 1 to 5
- Inconsistent ratings application across departments/levels
- Unclear or ill-defined ratings
- Ratings calibration process doesn't exist
- Ratings inflation or raters hesitant to differentiate
- Employees evaluated on things that don't align to or drive strategic goals – *busy work – task oriented. Why are we doing what we're doing? Understand the spirit behind the work an employee is doing.*
- Some performance aspects are yes/no vs. a rating, i.e., attendance

# Insight's Common PM Findings within Transit/Transportation/Mobility

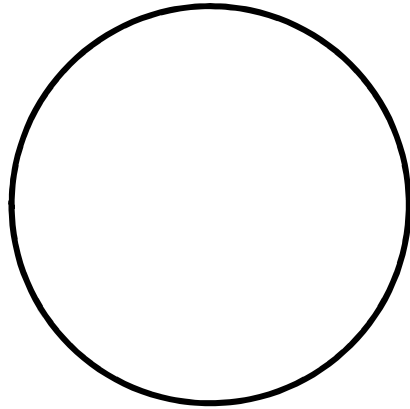
## Feedback

- Not taking the time to write a quality review - inconsistent
- Feedback is vague or generalized – or borrows auto populated language
- Waiting until the annual review to give important feedback
- Waiting for the annual review to begin documentation vs. year round
- Feedback doesn't align with the rating
- Feedback throughout the year of the performance period doesn't align to the Annual formal review - disconnect

# Performance Management Initiative Checklist



# Recommendations thus Far (high level)



- Employees evaluated on components that drive performance in alignment to the strategic plan, ensure execution of top job duties, and activate Agency values vs. random characteristics
- Ratings that inform merit not desired merit to inform ratings
- Align CEO performance expectations to the Strategic Plan
- Develop Leadership Competency expectations that reflect the desired culture and elevate leaders to the appropriate strategic level
- Train and equip all leaders on the Leadership Competencies and how to activate a culture of accountability

# Insight/SunLine Strategic Plan Timeline



# Insight/SunLine Strategic Plan Timeline *Cont'd*





**“I’ve been doing construction since I was fifteen. I like what I do, and I do what I like. Every night when I’m heading home, I always look back to see what I’ve built. It gives me a great sense of joy.**

**A few years ago, I built a children’s park not far from here, and when they finally opened the gates, and all the children came running in, I started to cry.”**





# Insight Strategies, Inc.

*You can find me at...*

**Teri Fisher**

CEO & Managing Partner

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## SunLine Transit Agency

**DATE:** March 26, 2025 **INFORMATION**

**TO:** Board of Directors

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

**RE:** Legislative Update for March 2025

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### Background

SunLine Transit Agency (SunLine) is actively meeting with members of our federal delegation to determine what fiscal and policy impacts may occur over the coming weeks, ahead of a planned visit to Washington, D.C. to advocate with the American Public Transportation Association's (APTA) Legislative Conference in May 2025.

### **State**

The 2025-2026 Legislative Session is in full swing, with approximately 2,350 bills introduced across both houses of the California Legislature. Many of these bills are in the early stages and will require amendments before being considered by policy committees. Key deadlines for amendments and policy committee meetings are fast approaching, with the Assembly's deadline for spot bill amendments on March 17<sup>th</sup> and the Senate's on March 26<sup>th</sup>. Policy committees must meet by May 2<sup>nd</sup> for fiscal bills and by May 9<sup>th</sup> for non-fiscal bills.

One of the most significant efforts underway is a push led by Senator Jesse Arreguín and Assemblymember Mark Gonzalez to secure an additional \$2 billion for local transit agencies as part of the Fiscal Year 2025-26 budget. This initiative aims to address funding shortfalls and support transit systems across the state.

The California State Transportation Agency's Transit Transformation Task Force met on March 11<sup>th</sup> to review its recommendations for improving first- and last-mile transit access, with a focus on seniors and people with disabilities. The final report, due by October 30<sup>th</sup>, 2025, will provide further guidance on these issues.

SunLine, with the assistance of Shaw Yoder Antwih Schmelzer & Lange (SYASL), is actively monitoring several pertinent bills:

- **SB 71 (Wiener):** Proposes the indefinite extension of California Environmental Quality Act (CEQA) exemptions for specific transit projects.
- **AB 35 (Alvarez):** Mandates expedited environmental assessments for clean hydrogen transportation initiatives.

- **AB 394 (Wilson):** Aims to enhance safety protocols for transit operators and passengers.
- **AB 259 (Rubio):** Suggests the indefinite extension of alternative teleconferencing procedures under the Brown Act.
- **SB 419 (Caballero):** This bill implements a Sales and Use Tax exemption for hydrogen fuel sales and consumption.

For a comprehensive overview of all bills under SunLine's review, please refer to the attached document.

### ***Federal***

On March 14<sup>th</sup>, before the funding deadline at midnight, the Senate passed H.R. 1968, the [“Full-Year Continuing Appropriations and Extensions Act, 2025”](#) to prevent a government shutdown and fund federal operations through the remainder of the fiscal year. The bill, which had passed the House with a [217-213](#) vote, was signed by President Trump on March 15<sup>th</sup>.

The Continuing Resolution (CR) funds government programs, including those under the Transportation, Housing and Urban Development, and Related Agencies (THUD) Act, at FY 2024 levels through September 30<sup>th</sup>. It includes \$20.9 billion for public transit in FY 2025, a 0.4% increase from FY 2024, and eliminates earmarks from the previous year's funding.

The CR, along with the Infrastructure Investment and Jobs Act (IIJA), boosts public transit funding by \$289 million and retains key policy provisions from the FY 2024 THUD Act. These provisions block the Rostenkowski Test, protect transit funding, and streamline project approvals under the Capital Investment Grants (CIG) program. Additionally, the CR allocates \$1.8 billion for the Better Utilizing Investments to Leverage Development (BUILD) competitive grants program to support surface transportation and public transit projects.

Attachment:

- [Item 15a](#) – Shaw Yoder Antwih Schmelzer & Lange State Legislative Update – March 2025



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

March 12, 2025

TO: Board of Directors  
SunLine Transit Agency

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

RE: **STATE LEGISLATIVE UPDATE – March 2025**

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### ***General Update***

Approximately 2,350 bills have been introduced across the two houses of the State Legislature in this first year of the 2025-2026 Legislative Session. Many of these bills start out as “spot” bills and will need to be amended before they can be heard in the Legislature’s policy committees. The Assembly requires spot bills to be amended by March 17 and the Senate by March 26. The deadline for policy committees to meet and hear bills with a fiscal impact is May 2 (May 9 for non-fiscal) for bills in the first house. For information about key legislative and budget deadlines, please see the 2025 Legislative Calendar available [here](#).

### ***Senator Arreguin and Assemblymember Mark Gonzalez Lead Effort to Secure Additional Funding for Transit***

Senator Jesse Arreguín (D-Berkeley) and Assemblymember Mark Gonzalez (D-Los Angeles) are leading efforts in the Legislature to secure an additional \$2 billion for local transit agencies as part of the Fiscal Year 2025-26 budget. The effort is supported by the California Transit Association and numerous stakeholders in the Bay Area and statewide. If successful, this effort would result in additional funding for all regions of the state and help address near-term funding shortfalls as regions prepare to advance self-help measures or find other solutions.

### ***CTC Elects New Leadership***

At its January 2025 business meeting, the California Transportation Commission elected Darnell Grisby as its Chair and Clarissa Falcon as its Vice Chair, effective March 1. Appointed to the Commission by Governor Newsom in March 2021, Grisby is a nationally recognized social impact leader who champions upward mobility by advancing policies that promote justice through economic opportunity and environmental stewardship. He currently serves as Senior Fellow at the Beneficial State Foundation, where he leads programs that support economic mobility through transportation and financial justice. He spent the previous nine years as Director of Policy Development and Research at the American Public Transportation Association, where he helped protect public transportation from budget cuts, assisted cities around the nation in pursuing local transit ballot initiatives, and showcased the economic power of

transportation investments. Grisby served as a legislative director and senior advisor in the California State Legislature and a government affairs professional before working at Reconnecting America, a think tank devoted to smart growth.

Appointed to the Commission by Senate President pro Tempore Toni Atkins, Clarissa Reyes Falcon is the President and Principal Consultant for Falcon Strategies. She previously worked for the California State Senate as a district director and as a public policy analyst for the San Diego Regional Economic Development Corporation. Falcon is a board member for the University of California, San Diego Chancellor's Community Advisory Board, the San Diego Union Tribune Community Advisory Board, the South County Economic Development Council, Circulate San Diego, and the Asian Business Association Board.

### ***CalSTA Holds Ninth Transit Transformation Task Force Meeting***

The California State Transportation Agency's Transit Transformation Task Force met for its ninth time in Sacramento on March 11. The meeting included discussion on the process and timeline for completing the Task Force's report of recommendations to the Legislature, required to be submitted by October 30, 2025, and provided Task Force members with the opportunity to review and discuss the proposed structure of the report. More significantly, the meeting included discussion on the draft staff report of recommendations for strategies to provide first-and-last mile access to transit and accessible transportation options for seniors and people with disabilities as well as a series of continuing or new topics, including Transportation Development Act reform and project delivery.

As we have highlighted for you in our last report, the California Transit Association (the trade organization to which SunLine belongs) continues to lead engagement in the Task Force discussions on behalf of California transit agencies. To inform the positions it takes at Task Force meetings, the Association continues to engage its membership on the challenges / barriers they face in delivering improvements to transit service and has convened an internal Transit Transformation Advisory Committee to develop policy recommendations (for breaking past these challenges) for submittal to the Task Force. The Task Force is subject to the state's open meeting requirements for state bodies, known as Bagley-Keene, and as such, all agenda materials are available on [CalSTA's website](#). The next Task Force meeting will take place on April 25<sup>th</sup> in San Francisco.

### ***Bills with Recommended Action***

#### **SB 71 (Wiener) CEQA Exemptions for Transit Projects – RECOMMEND SUPPORT**

Co-Sponsored by the California Transit Association, this bill would extend indefinitely the current January 1, 2030 sunset date established by SB 922 (Wiener, 2022) for statutorily authorized CEQA exemptions for transit and transportation projects, add additional project-types to the list of exemptions (ferry terminals, transit operational analysis, bus stops, bus shelters), and make substantive procedural changes surrounding board actions (i.e. board process for establishing a project's cost estimate).

#### **SB 359 (Niello) Diesel Fuel Tax Law: Exempt Bus Operation – RECOMMEND SUPPORT**

Current law provides a diesel fuel tax exemption for transit districts and cities that own and operate a transit system. This bill would extend this exemption to include a county that owns and operates a local transit system.

**SB 419 (Caballero) Hydrogen Fuel Sales Tax Exemption – RECOMMEND SUPPORT**

This bill would implement a Sales and Use Tax exemption for the sale and consumption of hydrogen.

**SB 752 (Richardson) Zero-Emission Bus Sales Tax Exemption Extension – RECOMMEND SUPPORT**

This bill would extend from January 1, 2026, to January 1, 2028, the partial sales and use tax exemption for zero-emission buses (ZEBs) first established in 2019 and subsequently renewed in 2022.

**AB 35 (Alvarez) CEQA Review for Clean Hydrogen Transportation Projects – RECOMMEND SUPPORT**

This bill would require applications for a discretionary permit or authorization for a clean hydrogen transportation project to be reviewed through a clean hydrogen environmental assessment. The bill would also require the lead agency to determine whether the assessment is approved and, if it is approved, issue the discretionary permit or authorization no later than 270 days after the completion of the project application.

**AB 394 (Wilson) Transit Safety – WATCH**

Co-Sponsored by the California Transit Association, this bill would enhance the safety and security of California’s public transportation systems by strengthening protections for transit operators, employees, and passengers. The bill accomplishes this goal by applying enhanced penalties for assaults to all transit employees, as well as updated provisions for trespass violations on transit systems. Further, AB 394 would empower agencies to seek court-issued prohibition orders against those convicted of assault or trespass. AB 394 promote safer transit environments for transit riders and employees alike.

**AB 1070 (Ward) Transit District Governing Boards – WATCH**

This bill would prohibit a transit district from compensating a member of the governing board unless the member demonstrates personal use of the transit system for at least one hour or for four trips per month. The bill would also require the governing board of a transit district to include 2 nonvoting members and 4 alternate nonvoting members. These members would be required to include users of the service, and representatives of the labor organization representing transit employees.

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



**SunLine Transit Agency**

**DATE:** March 26, 2025 **INFORMATION**  
**TO:** Board of Directors  
**FROM:** Mona Babauta, CEO/General Manager  
**RE:** General Manager's Report for March 2025

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**Operations Update*****Hanson Bridgett 2025 Employer Services Seminar – Los Angeles, CA (February 13, 2025)***

On Thursday, February 13, 2025, our Chief Transportation Officer and Chief of Human Relations attended the Employer Service Seminar in Los Angeles, hosted by Hanson Bridgett. The annual seminar focused on recent labor and employment law developments, reviewing new employment laws for 2025, including wage and hour class actions, the new captive audience bill, and the Fair Choice- Employee Voice Final Rule, among others.

**Safety Update*****SWAT Training (February 11, 2025)***

On Tuesday, February 11, 2025, the regional SWAT team requested a training bus to enhance their proficiency in handling emergency situations. The training aimed to familiarize them with the bus layout, including the location of all entrances/exits, the onboard video surveillance system, and the proper procedure to shut off the bus in case of an emergency. This joint training has enabled local law enforcement to respond more swiftly and effectively to such events.

***Near-miss Reporting Outreach – Thousand Palms, CA (February 27, 2025)***

On Thursday, February 27, 2025, the Safety Department staff organized an employee engagement event aimed at promoting near-miss reporting within the agency. The event focused on raising awareness about the importance of reporting near-miss incidents to enhance overall safety. By encouraging employees to report these incidents, SunLine aims to identify potential hazards and prevent future accidents. This proactive approach is expected to foster a safer work environment and improve the agency's safety culture.



## **Planning Update**

### ***North Indio Community Input Open Houses – Indio, CA (February 19-20 & 27, 2025)***

The Planning department hosted three (3) open house events on February 19, 20, and 27 at Shadow Hills and Amistad High Schools. Through these events, staff gathered community input on public transit service needs in North Indio, which will be analyzed and incorporated into the development of transit services in the area.

### ***California Integrated Travel Project (Cal-ITP) – Open Loop Payment Solution for the Coachella Valley***

Staff is making progress on multiple projects, including Open Loop payments and the On-Board Ridership Study. In collaboration with CAL-ITP, the team is developing a scope of work to solicit proposals from CAL-ITP-approved vendors. This project will enable fixed-route riders to pay bus and commuter link fares using credit and debit cards. The implementation of Open Loop payments aligns with SunLine's goal of enhancing the user experience and establishing SunLine as a preferred transportation option.

### ***On-board Ridership Study***

Planning staff, in collaboration with Moore and Associates, launched the On-Board Ridership Survey in mid-March. To maximize participation, staff worked with the Marketing Team to develop informational materials and rollout strategies. This survey aims to provide valuable insights into rider demographics, travel behaviors, and destination patterns, helping the agency enhance its transit services.

### ***Transit App Partnership***

SunLine has now partnered with Transit App, an industry leading trip planning app. This app will allow riders to plan trips using public transit in the Coachella Valley and beyond. Riders will be able to plan trips starting in the Coachella Valley with destinations in the greater Los Angeles area. Transit App provides real time bus location, stop arrival times, and real time service alerts. Riders will be able to participate in surveys on their journey which will provide SunLine with customer feedback on stop amenities and cleanliness, the journey experience inside the bus, and overall trip satisfaction score. Staff will use this data to improve the customer experience.

## **Community/Industry Engagement Events**

### ***Career Day – Indio, CA (February 5, 2025)***

On Wednesday, February 5, 2025, SunLine participated in Career Day at Amistad High School. Motor Coach Operator, Emmanuel Mora, attended as a Hiring Committee member and representative of the Operations Department. This successful event provided an opportunity to inspire and guide students, encouraging them to explore potential career paths for their future growth. Emmanuel shared valuable insights about

the transit industry and the roles available, helping students better understand the opportunities that could shape their professional journeys. The event was well-received, positively impacting the students and sparking interest in future careers within the industry.

***APTA Marketing, Communications & Customer Service Workshop – Long Beach, CA (February 23 – 26, 2025)***

Marketing staff attended the annual APTA Marketing, Communications, and Customer Experience Workshop in Long Beach, CA from February 23-26, 2025. The team returned with valuable insights and is eager to implement the strategies and ideas discussed during the conference. Key topics included enhancing social media engagement and follower growth, effective storytelling to connect with riders and communicate transit agencies' needs to government officials—highlighting areas such as job creation and infrastructure support—strategies for increasing ridership, particularly among youth and teens, and innovative approaches to employee recruitment.

***California Transit Works (CTW) Mentors in Motion Conference – Monterey, CA (February 28 – March 2, 2025)***

From February 28 to March 2, 2025, staff from the Operations, Safety and Maintenance departments attended the CTW: Mentors in Motion 2025: Inspiring Each Other and Building Community conference in Monterey, CA. This annual event brought together over 300 transit workers, managers, union members, and representatives from educational institutions to strengthen labor-management partnerships, enhance frontline worker skills, and improve public transit services through collaboration.

Attendees explored innovative solutions to industry challenges through partnerships and programs from across California and the U.S. As part of SunLine's ongoing collaboration with Amalgamated Union Local 1277, the event emphasized the importance of fostering strong labor-management relationships. Mentors from other agencies shared impactful testimonials, highlighting the value of mentorship and innovative strategies for addressing sector challenges. The conference reinforced the power of partnerships in driving progress and fostering stronger industry connections.

***3<sup>rd</sup> Annual Ability Sports Festival – Coachella Valley High School, Thermal, CA (March 1, 2025)***

On Saturday, March 1, 2025, the Marketing team participated in the 3rd Annual Ability Sports Festival, hosted by Coachella Valley Unified School District's Special Education Department. This engaging and interactive event provided an opportunity for families of students with disabilities to explore the various services offered by SunLine and other community organizations. Our team connected with approximately 70 families, offering valuable information and support tailored to their unique needs.

***Día del Niño/Day of the Child – Coachella, CA (March 8, 2025)***

On Saturday, March 8, 2025, the Marketing team joined the fun at the Día del Niño (Day of the Child) celebration at Coachella Veterans' Park. We engaged with 351 community members, sharing information about SunLine's youth programs, like Haul Pass, and connecting with local families. The event was filled with joy and laughter as children enjoyed SunLine-themed coloring books and crayons. While the event welcomed all ages, the majority of attendees were parents and young children, creating a warm and lively atmosphere. With the help of amazing vendors and enthusiastic families, the day was a true celebration of the incredible children in our community!

***Ophelia Girls 2025 Annual Luncheon: It's a Girls' World – Rancho Mirage, CA (March 18, 2025)***

On Tuesday, March 18, 2025, SunLine staff had the privilege of joining the Ophelia Girls and their mentors at their annual luncheon, hosted at the Westin Rancho Mirage. Chair Ross proudly presented a scholarship on behalf of the agency to a well-deserving senior from Cathedral City High School. The event was a heartfelt celebration of the inspiring mentors and Ophelia Girls, highlighting the significant impact of this transformative program. As a proud sponsor, SunLine is honored to support this initiative – not only by promoting the importance of public transit but also by helping local young women pave their way toward success.

***Senior Inspiration 2025 Awards Luncheon, Special Route – Indio, CA (March 27, 2025)***

SunLine Transit Agency is partnering with Riverside County Supervisor V. Manuel Perez's office to provide transportation for seniors in the eastern Coachella Valley to attend the 33rd Annual Senior Inspiration 2025 Awards Luncheon at Fantasy Springs Casino in Indio, CA. This open-to-the-public service will be offered via fixed route, with pick-up locations at the senior centers in the cities of Thermal, Mecca and North Shore. For event details and to purchase tickets, visit: [33rd Annual Senior Inspiration Awards 2025 | Supervisor V. Manuel Perez Fourth District County of Riverside](#)